

The City of South Tucson, Arizona Residential Target Market Analysis

The Final Market Study

April 13, 2021

Analysis
prepared by:



LandUseUSA
UrbanStrategies

In collaboration
with:



Acknowledgements

LandUseUSA | Urban Strategies has prepared this Residential Target Market Analysis (TMA) for the City of South Tucson, Arizona. The city is centrally located in Pima County and surrounded on all four sides by the larger City of Tucson. This study has been completed in collaboration with the Incremental Development Alliance; through a collaborative effort among public and private stakeholders; and with funding and project assistance from the Pima County Housing Center.

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This housing study has been prepared by Sharon Woods, President of LandUseUSA | Urban Strategies. The firm was founded in 2008 and is located in the Greater Lansing Metropolitan Area in Central Michigan. Lansing is also home to Michigan's state capital, department of treasury, land bank, and economic development corporation. LandUseUSA's contact information is provided below:

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General Work Approach

Introduction

The Target Market Analysis (TMA) approach focuses on identifying the magnitude of potential for adding missing housing formats and shopping choices within counties, cities, and urban places of all sizes. It involves rigorous data analysis and modeling and is generally based on in-migration into each county and city; internal migration within those places; movership rates by tenure and lifestyle cluster; and housing preferences among households that are on the move.

Results of this Residential TMA and study are presented by target market (lifestyle cluster), tenure (renter and owner), building format (detached and attached), and price point (value and rent). Guidance is also provided on the relationships between prices and unit sizes based on current real estate market conditions.

The following narrative focuses on data results from the Residential TMA. It is intentionally succinct and does not include detailed explanations of the analytic methodology and approach, determination of the target markets, derivation of migration and movership rates, typology or range of small and mid-sized building formats, and related terminology.

Step Buildings (Typology of Formats)

Introduction – The City of South Tucson has varying degrees of market potential for new housing units across a range of building sizes. The city can help retain and grow its households by matching those building sizes with the housing formats most preferred by the target markets.

Results of the analysis are also being used to identify the market potential for new housing formats that are most under-represented or missing from the established neighborhoods. Under-represented formats in South Tucson include townhouses, walkups, apartment buildings, and lofts. The following narrative introduces a step building typology for some of these housing formats.

Incremental Development Alliance – The non-profit organization of IncDev has prepared a typology of small to mid-sized building formats. Some of the step building formats are missing or under-represented in the City of South Tucson, so they could be considered as options for neighborhood infill, mixed-use developments, and urban lofts. The following list summarizes some examples:

Typology of Small to Mid-Sized Step Buildings

Cottages – Skinny, Narrow, and Wide – Mostly Detached

Duplexes and Triplexes – Stacked and Side-by-Side

Rowhouses and Townhouses – Mostly Side-by-Side

Co-Living Houses with Suites – Mostly Stacked, Targeted at Students

Apartment Houses, Buildings, and Walkups – Mostly Stacked

Flex, Live-Work, and Lofts over Street-front Retail – Mostly Stacked

Detached and Attached Formats – Conventional housing studies often use the terms single-family and multi-family when describing unit formats, and that nomenclature tends to be reinforced by municipal tracking of building permit data; use-based zoning ordinances; and practices within the lending industry.

The Target Market Analysis intentionally avoids use-based nomenclature (single-family and multi-family) when referring to building formats. Instead, it differentiates between detached and attached formats in alignment with IncDev's typology of step buildings.

Building Sizes – Townhouses and multiplexes should always have distinct façade articulations with no more than six (6) private entrances, porches, balconies, or stoops along any one side of each building. Some midrise and multiplex buildings could have back-to-back units, with up to 12 units on any given level.

Other buildings could include a combination of one-level and split-level lofts and townhouses that are stacked in any combination. Again, stacked lofts should have no more than six (6) units along any building side and regardless of the building format – but the units may have shared entrances.

Townhouses – The term townhouse may refer to units that share walls and that are side-by-side rather than stacked. Townhouses with private entrances are almost always included in detached or semi-detached nomenclature, which is predominated by traditional houses.

Townhouses with shared entrances are always included in the attached nomenclature; and they may be in sets of two (duplexes), three (triplexes), four (fourplexes), or more. Again, no more than six (6) townhouses should be developed along the side of any given building.

Accessory Dwellings – Flats and lofts above garages; cottages added behind existing houses; and secondary dwellings added onto main houses are generally referred to as accessory dwellings. In conventional zoning nomenclature, they are often designated as Accessory Dwelling Units (ADU), ancillary units, or secondary suites. They are also sometimes referred to as mother-in-law suites or granny flats, although these latter examples are more likely to include basement apartments.

Live-Work Units – The live-work building type is usually intended for units that are explicitly designed for the owner or renter to operate a business in the same townhouse that they live in. Usually the front half of the lower level is a small business; the back half of the lower level is a parking garage; and the upper level is the living quarters.

To broaden the definition, live-work units may also include mixed-use projects where the street-front levels are filled with retail merchants or small businesses; and the upper levels are occupied by other renters and/or owners. The business proprietor and the residential tenant do not necessarily need to be the same person.

Live-work units can also apply to a variety of other building formats where residential tenants are simply permitted to operate small home-based businesses. It is not necessary for these types of live-work units to have a traditional store front or a main street presence. However, they should be located adjacent to a downtown.

Courtyards and Public Spaces – Wherever possible, new multiplexes should include shared courtyards, plazas, or other types of common areas with open space and seating. This format is also referred to as Courtyard Apartments. Other housing formats like cottages, patio homes, duplexes, and accessory dwellings can also be arranged around courtyards. In mixed-use projects and downtown districts, street-level courtyards should be designed and integrated into the public realm. In some special cases, pocket parks and town squares can also serve as shared courtyards.

Missing Middle Housing – Opticos Design Group, an urban planning and architecture firm, has prepared a typology of housing formats that are often missing from cities and urban places. The typology includes: duplex, fourplex, courtyard building, cottage court, townhouse, medium multiplex, and live-work.

The Missing Middle Housing typology explicitly excludes traditional houses, accessory dwellings, and main street retail and mixed-use buildings (other than live-work units). Therefore, the nomenclature used within the Residential and Retail Target Market Analysis focuses on IncDev's typology of step buildings, which spans a wider spectrum of building sizes and also includes retail buildings.

Location Strategies

The Target Market Analysis approach is designed to demonstrate the relative magnitude of market potential and feasibility of traditional houses, missing housing formats, new retail choices, and mixed-use projects throughout the City of South Tucson.

The market potential for South Tucson has not been qualified by specific neighborhood or location within the city. Even so, the following lists provide some general guidance for consideration, and are usually applicable to most cities and urban places – including South Tucson:

Location Priorities for New Residential Units:

1. Established mixed-use districts or city centers that serve as focal points (highest priority).
2. On redevelopment or reinvestment sites with potential to develop mixed-use projects with a new hub or focal point of daytime activity and nightlife.
3. Adjacent neighborhoods within one block from the city center or focal point.
4. Along established corridors linking to the downtown, like 4th, 6th, and 10th Aves.
5. Within vacant iconic buildings like former schools, churches, warehouses, etc.
6. Corner sites and larger parcels that are clustered and concentrated within established neighborhoods.
7. Mid-block sites and smaller parcels that are scattered throughout the established neighborhoods (lowest priority)

Assuming that the typology of step buildings is followed as a general guide, recommended building formats may also be refined to fit the appropriate context of place. For example, it is not usually advised to build townhouses in the middle of a neighborhood block that is predominated by detached houses. However, townhouses could be a good transitional use from houses to city center or focal point. They could also be used to optimize views of city nightlife; and could be a good alternative for areas where detached houses might be relatively slower to sell – such as along railroad tracks or behind commercial strip centers.

Location Strategies – Depending on the unique attributes of each city and with consideration for the context of place, a variety of strategies can be used to introduce new housing formats. A few examples are provided in the following list, and all of them are generally referred to as “New Builds” within this report. This list excludes “Rehabs”, which is a term reserved for expansions, remodels, renovations, or other improvements to the existing residential units before they are relisted for-sale or for-lease.

“New Builds” – Recommended Strategies

1. Convert iconic vacant buildings (such as schools, city halls, hospitals, hotels, theaters, and/or warehouses) into new flats and lofts.
2. Convert vacant or under-utilized upper levels above street-front retail into new lofts; and restore historic buildings to their original character.
3. Build new townhouses and row houses, particularly in infill locations near city centers and/or new focal points or hubs of daytime and nightlife activity.
4. Build new flats and lofts in small mixed-use projects, particularly above new merchant space with frontage along main street corridors.
5. Restore houses that have been vacant for more than one year; and make the necessary improvements to return them to market. This especially applies to any houses that have historic or aesthetic value.
6. Replace vacant and obsolete houses with new structures; and consider some cottages in fringe locations that do not undermine the character of traditional neighborhoods.
7. Build new cottages (including cottage duplexes) arranged around shared courtyards within established residential neighborhoods.
8. Allow, enable, and encourage the development of accessory dwellings like flats above garages, expansions or additions to the main house, and detached cottages.

Annual Market Potential

Based on results of the Target Market Analysis, up to eighty (80) new and existing buyers could potentially migrate into and within the City of South Tucson each year. In addition, up to 360 new and existing renters could potentially migrate into and within the city each year.

These figures are based on the annual number of home buyers and renters migrating into and within the city each year. They have also been boosted for the interception of some migrating households that might otherwise bypass the city for other parts of Pima County. Note: Because these figures include internal movership, they represent maximums for new-builds and should not be exceeded in any given year.

Among the 80 migrating owner households, most of them will be inclined to purchase detached houses; and very few would choose alternatives like townhouses, row houses, or condos with private entrances. Among the 360 migrating renter households, only 200 of them will choose to lease attached units (with shared entrances); and the other 160 will search for detached houses, townhouses, or row houses with private entrances.

Among the 80 migrating owner households, thirty-two (32) of them will be Expanding Horizons households. In addition, six (6) of them will be Fast Track Couples, Rooted Flower Power, and Digital Dependents, each (for a subtotal of eighteen). Other migrating target markets seeking to purchase a house will include the Balanced Harmony, Town Elders and Leaders, and Senior Discount lifestyle clusters.

The 80 owner target markets will tolerate a range of home values from \$150,000 up to about \$400,000. New houses with higher prices should not be built, developed, or constructed on speculation alone. In other words, they should only be custom-built or build-to-suit homes.

Among the 360 migrating renter households, sixty-four (64) of them will be Daring to Dream households; fifty-six (56) will be Striving Singles; and forty-four (44) will be Striving Forward households. Other migrating target markets seeking to lease units will include Humble Beginnings (32 households), Family Troopers (26), Expanding Horizons (24), Bohemian Groove (20), and Colleges and Café (20) lifestyle clusters.

The 360 renter target markets will tolerate a range of contract rents from \$400 up to \$1,400 per month. The vast majority (330) of new-build and rehabbed units should have prices of \$850 or less; and only 30 of them should have higher prices.

The minimum market potential excludes internal movership within the City of South Tucson and focuses only on in-migration among new buyers and renters. Based on the results of the TMA, up to forty (40) new buyers could potentially migrate into the City of South Tucson each year. In addition, up to 180 new renters could potentially move into the city each year. In other words, for every new household migrating into the city, there is another household moving within the same city.

Annual and Five-Year Timelines

The market potential, values, and rents reported in this Target Market Analysis can be generally applied for each year between 2021 and 2025. The Target Market Analysis measures the market potential for one single year; and it can generally be forecast as an aggregate market potential that rolls-up over the next five years. Some flexibility can be applied to this timeline, depending on local market conditions, economic events, and transitioning demographics.

Cities experiencing little or no change may find that the annual market potential is still relevant in beyond 2025 and through 2030. If the City of South Tucson begins to experience rapid transition or realizes significant benefits from market or economic events, then a quicker update may be warranted.

If South Tucson' market potential is not met with new-builds in any given year, then that potential does not roll-over and should not be added to subsequent years. Instead, the migrating target markets will settle for existing housing choices (even if those choices do not meet their needs or expectations); or be intercepted by other parts of Pima County.

On the other hand, regardless of whether the market potential is served within any given year, it is replenished with new households (and target markets) that are moving into South Tucson in each subsequent year. The table on the following page demonstrates several different timelines; assuming that the first project breaks ground and is completed in 2021; and alternate timelines where that first project is delayed until later years.

Conservative Scenario
New-Builds Only, by Tenure
Annual Market Potential with Five Year Cumulatives
The City of South Tucson, Arizona

For Sale	2021 Year 1	2022 Year 2	2023 Year 3	2024 Year 4	2025 Year 5	Cumulative Potential
Timeline 1	40	40	40	40	40	200
Timeline 2	--	40	40	40	40	160
Timeline 3	--	--	40	40	40	120
Timeline 4	--	--	--	40	40	80
Timeline 5	--	--	--	--	40	40
For Lease	2021 Year 1	2022 Year 2	2023 Year 3	2024 Year 4	2025 Year 5	Cumulative Potential
Timeline 1	180	180	180	180	180	900
Timeline 2	--	180	180	180	180	720
Timeline 3	--	--	180	180	180	540
Timeline 4	--	--	--	180	180	360
Timeline 5	--	--	--	--	180	180

Internal Movership and Rehabs

The market potential numbers provided in Section B of this report represent a conservative scenario only; and they are based only on the in-migration of new households moving into the City of South Tucson. There is also a second component to migration, which is internal movership within the city. This is a larger group of households that already live in the city and that are swapping or trading addresses.

In general, there are just as many existing households moving within the City of South Tucson as there are migrating into the city. For every 40 new owner households migrating into the city, there are also about 40 existing owner households moving within the city. The latter figure is a good indicator of the number of rehabs that should be completed within the city each year.

Conservative Scenario
New-Builds and Rehabs by Tenure
Annual Market Potential with Five Year Cumulatives
The City of South Tucson, Arizona

Detached For Sale	2021 Year 1	2022 Year 2	2023 Year 3	2024 Year 4	2025 Year 5	Cumulative Potential
New-Builds Only	40	40	40	40	40	200
Rehabs Only	<u>40</u>	<u>40</u>	<u>40</u>	<u>40</u>	<u>40</u>	<u>200</u>
Cumulative	80	80	80	80	80	400
Attached For Lease	2021 Year 1	2022 Year 2	2023 Year 3	2024 Year 4	2025 Year 5	Cumulative Potential
New-Builds Only	180	180	180	180	180	900
Rehabs Only	<u>180</u>	<u>180</u>	<u>180</u>	<u>180</u>	<u>180</u>	<u>900</u>
Cumulative	360	360	360	360	360	1,800

The conservative scenarios are pragmatic and assume business as usual (notwithstanding the temporary economic impacts of Covid-19 during the 2020-2021 health pandemic). They also assume that existing master plans, zoning ordinances, municipal policies, real estate conditions, lending practices, incentive programs, placemaking initiatives, and the overall business development climate will generally remain as-is with little or no change.

The conservative scenarios also assume that existing households already living within the City of South Tucson will effectively swap or trade among existing housing choices. The vacated housing units will either be occupied (with or without improvements) by other resident households moving within the city; or they will remain vacant.

The conservative scenarios represent the most attainable goals with relatively low risks of over-building in the market. In comparison, the aggressive scenarios represent the not-to-exceed maximum threshold and assumes that existing households moving internally within South Tucson will also trade into new and rehabbed housing formats – if enough new choices are available.

Conservative and Aggressive Scenarios
Nomenclature or Terminology
The City of South Tucson, Arizona

Scenario	Market Strategy	Basis (Migration)	Owner	Renter
Conservative	New-Builds Only	In-Migration Only	40	180
Conservative	Rehabs Only	Internal Movership	<u>40</u>	<u>180</u>
Conservative	New-Builds + Rehabs	Total Movership	80	360
Aggressive	New-Builds Only	Total Movership	80	360

For example, if the conservative scenarios indicate a market potential for 40 new-build houses plus 40 rehabbed houses (for a total of 80); then the aggressive scenario indicates a maximum of 80 new-build units. As another example, if the conservative scenario calls for 180 new-build for-lease units plus 180 rehabbed for-lease units (for a total of 360); then the aggressive scenario suggests a not-to-exceed maximum of 360 new-build for-lease units.

Boost for Benefit of Doubt – The conservative and aggressive scenarios both reflect a modest boost (a.k.a., bolster, lift, increase, or upward adjustment) to the number of existing households by lifestyle cluster. This bolstering of the numbers is intended to give communities some benefit-of-doubt in their ability to intercept households moving into and within the region and counties, and ability to increase their capture rate among the target markets.

The boost is about +10% and has already been integrated and reflected in the annual market potential for the City of South Tucson. All market potential numbers under both the conservative and aggressive scenarios reflect the same magnitude of boost.

Economic Impacts – The aggressive scenarios also represent best-case scenario or not-to-exceed maximums, and can be achieved only if all impediments to development are either removed or otherwise overcome. Developers should pursue an aggressive scenario only after testing the market to ensure that the optimal home prices, rents, and unit sizes are be absorbed quickly.

The market potential for new-builds units could also be boosted to the aggressive scenario and beyond, but only through significant economic events, such as new highway linkages (including bridges); restoration of historic districts (including islands); sudden in-migration following the creation of good paying jobs; and the development of catalytic types of projects.

Residential TMA

The Market Study

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Section B	Market Potential - Minimum
Section C	Households and Income
Section D	Housing Units and Vacancies
Section E	Home Values and Rents
Section F	Income and Price Brackets
Section G	Existing Choices – For Lease
Section H	Movership Rates by Tenure

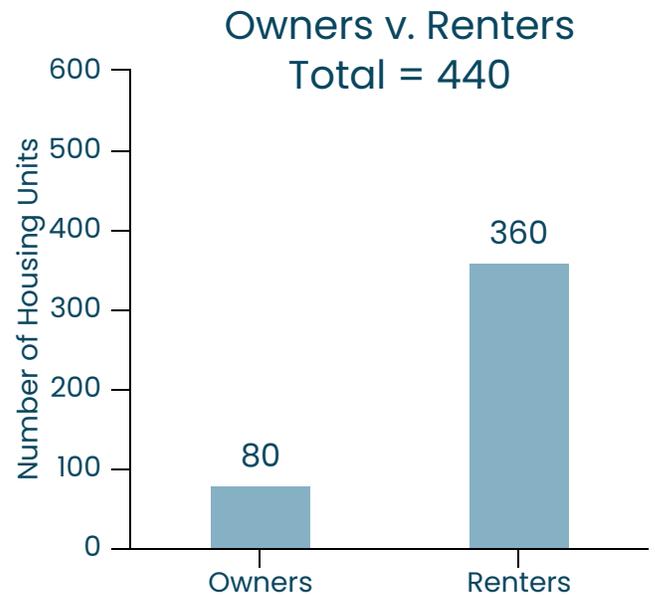
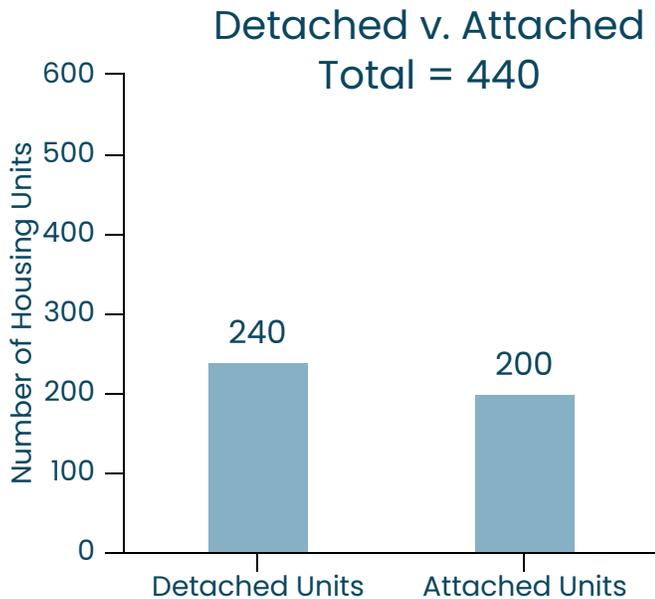
The Appendix

Section I	71 Lifestyle Clusters
Section J	Target Markets – Owners
Section K	Target Markets – Renters
Section L	Supplemental Demographics

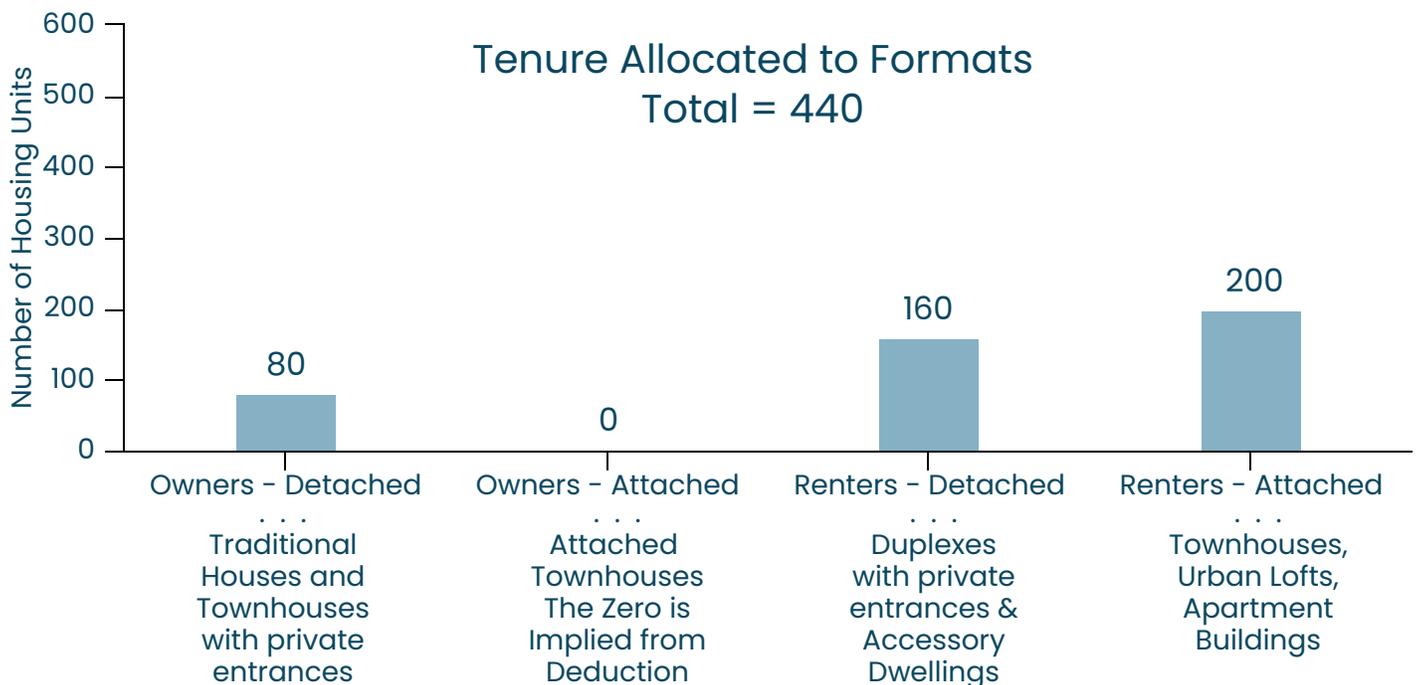
Section A

Annual Market Potential | South Tucson

New Builds and Rehabs | Year 2025



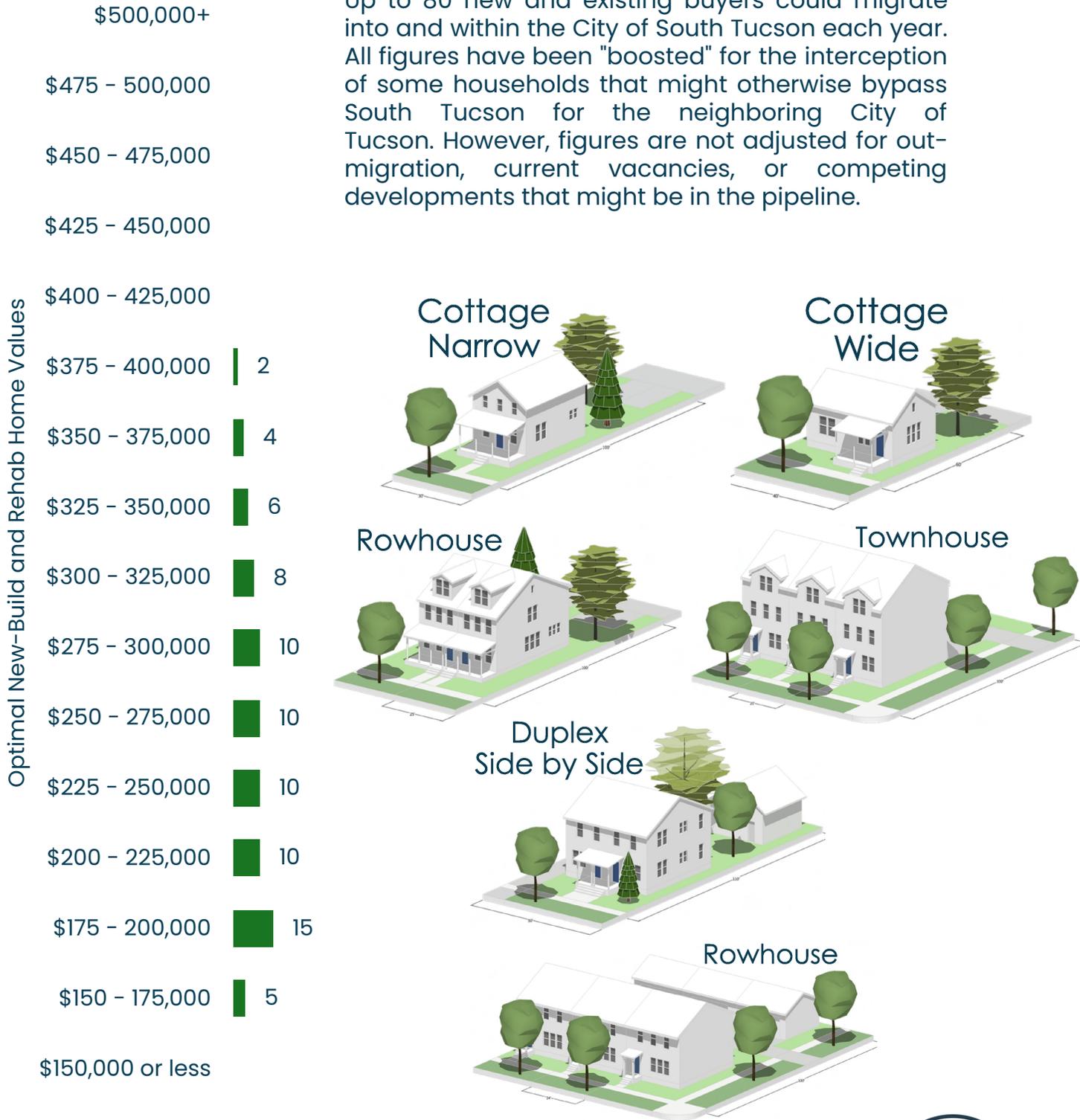
All charts represent the maximum and aggressive market potential based both in-migration into and internal movership within the City of South Tucson. There is a need to CAPTURE and RETAIN these new households that are moving into the city by adding new units every year and by also rehabbing existing units. The figures in the charts include possible diversion and INTERCEPTION of additional households that might otherwise be inclined to move into the neighboring City of Tucson. All figures are unadjusted for out-migration, and current vacancies.



Source: Target market analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Detached Housing Units | South Tucson Owners and Values | Year 2025

Up to 80 new and existing buyers could migrate into and within the City of South Tucson each year. All figures have been "boosted" for the interception of some households that might otherwise bypass South Tucson for the neighboring City of Tucson. However, figures are not adjusted for out-migration, current vacancies, or competing developments that might be in the pipeline.

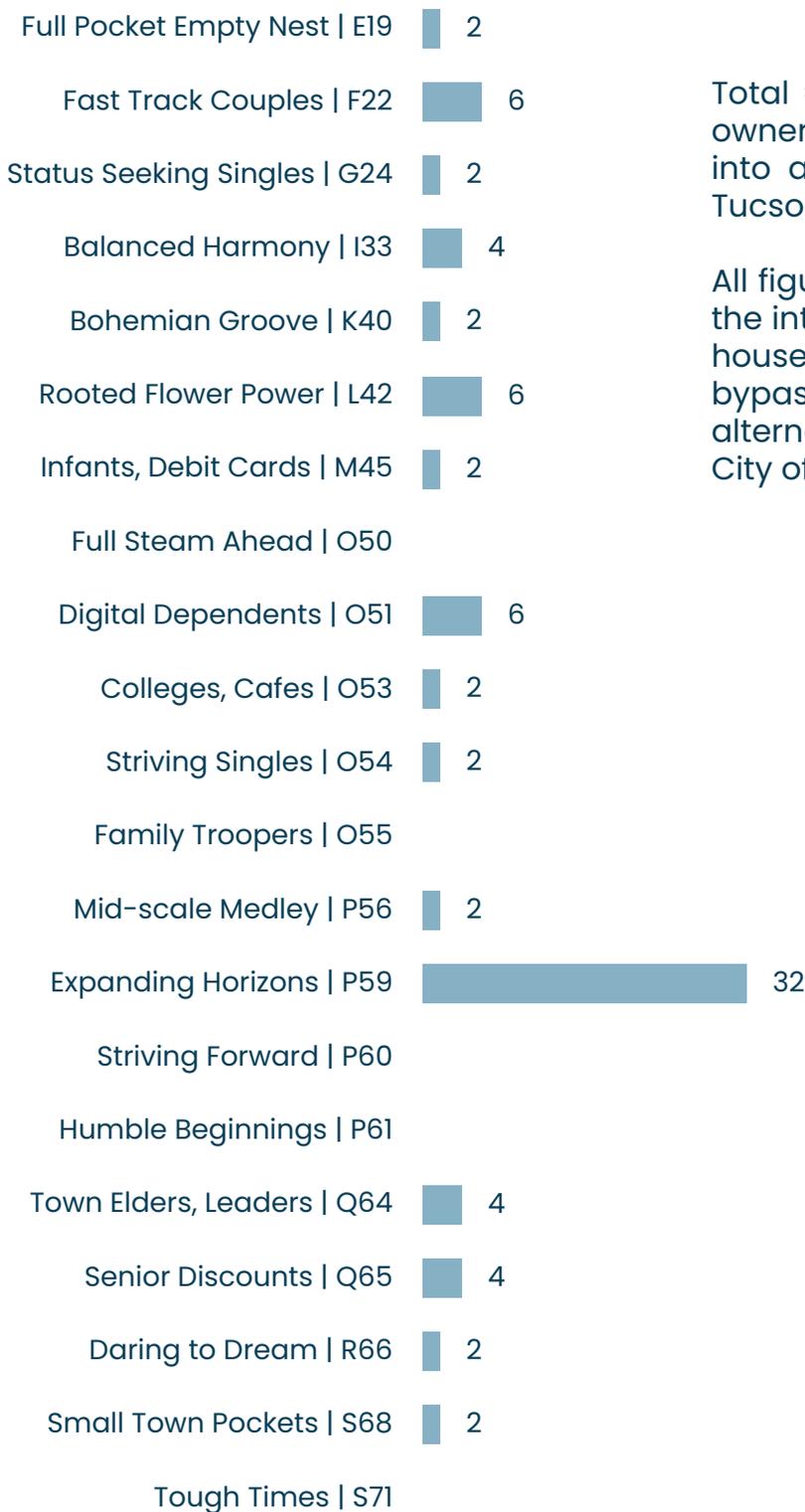


Based on the results of a Target Market Analysis and study of households moving into the local market. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.



Annual Market Potential | South Tucson

Total Owner Target Markets | Yr 2025



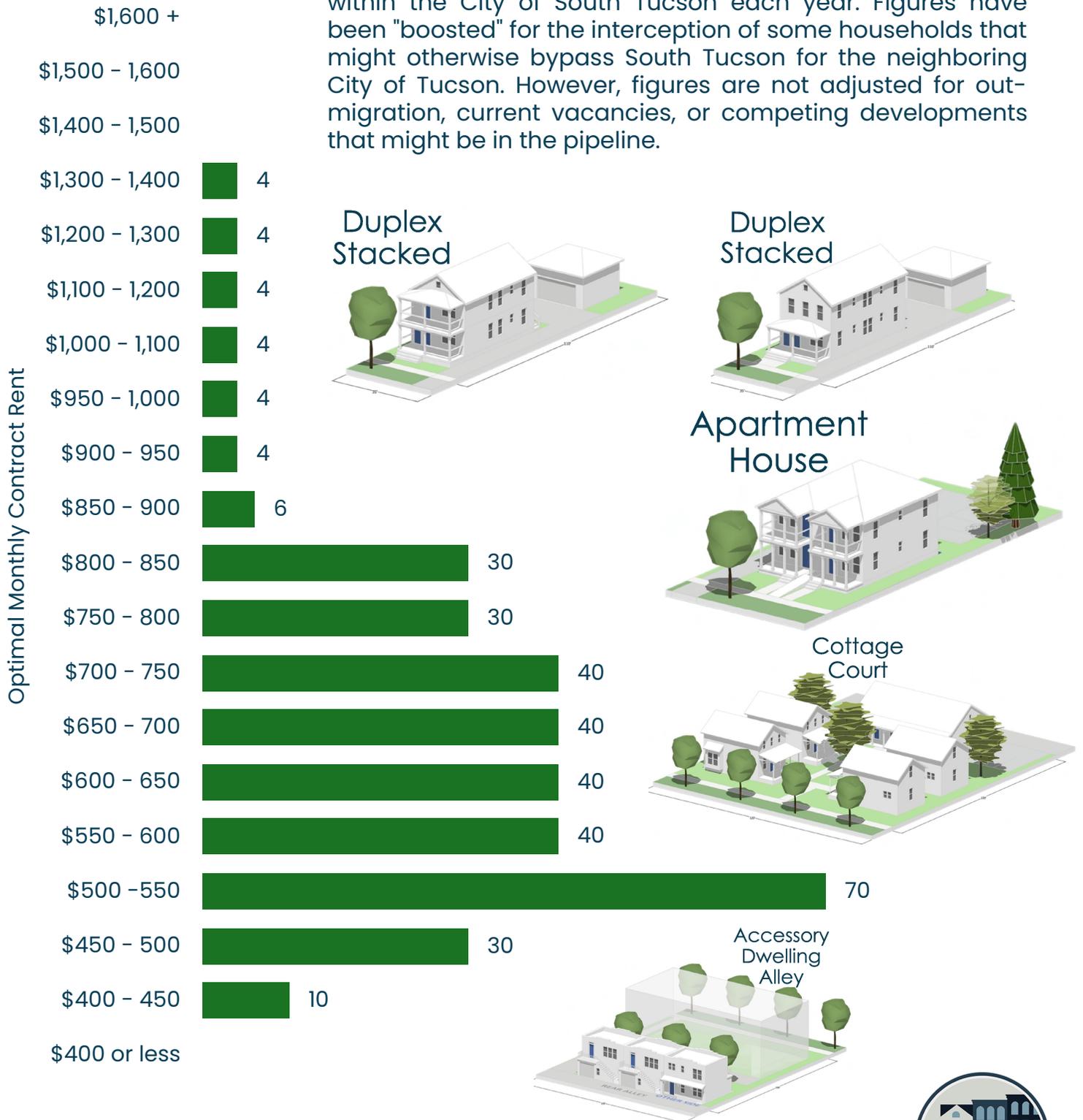
Total = Up to 80 new and existing owner households could migrate into and within the City of South Tucson each year.

All figures are adjusted upward for the interception of some migrating households that might otherwise bypass the city to choose alternatives in the neighboring City of Tucson.



All Housing Formats | South Tucson Renters and Rents | Year 2025

Up to 360 new and existing renters could migrate into and within the City of South Tucson each year. Figures have been "boosted" for the interception of some households that might otherwise bypass South Tucson for the neighboring City of Tucson. However, figures are not adjusted for out-migration, current vacancies, or competing developments that might be in the pipeline.

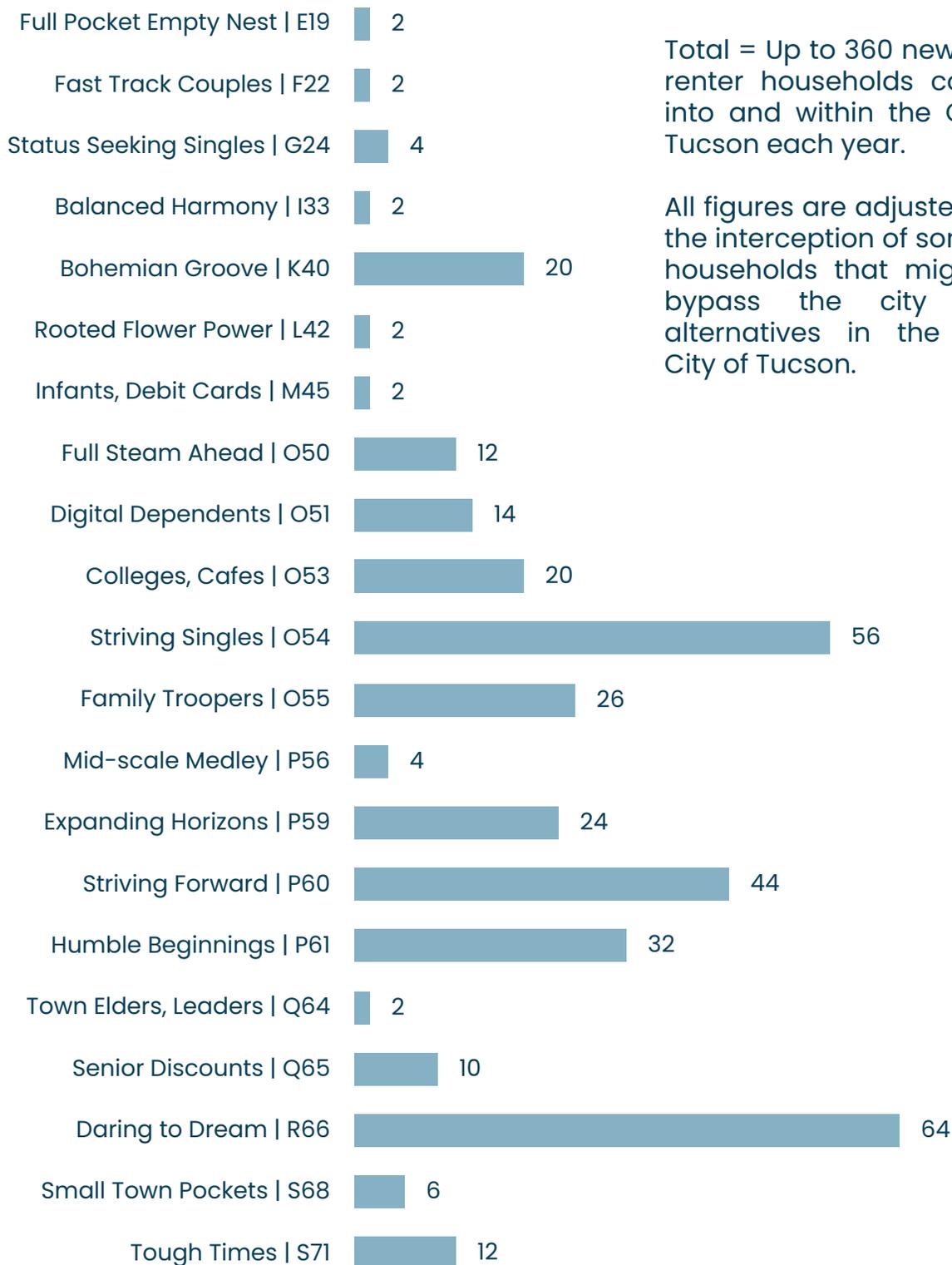


Based on the results of a Target Market Analysis and study of households moving into the local market. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.



Annual Market Potential | South Tucson

Total Renter Target Markets | Yr 2025



Total = Up to 360 new and existing renter households could migrate into and within the City of South Tucson each year.

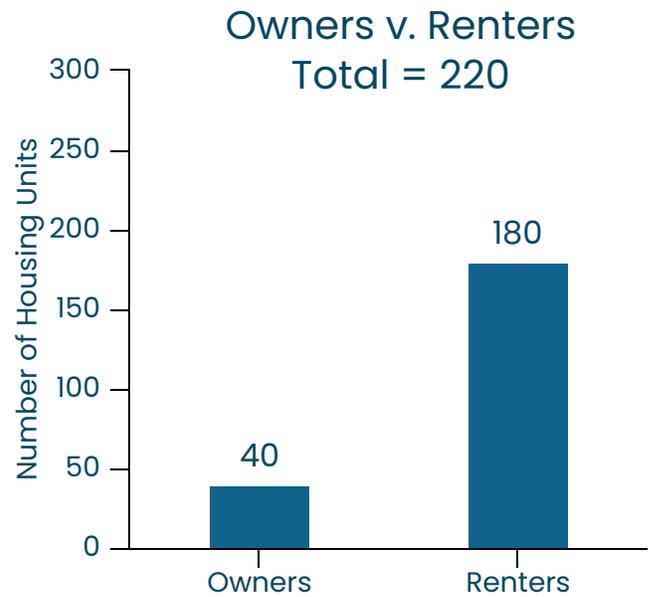
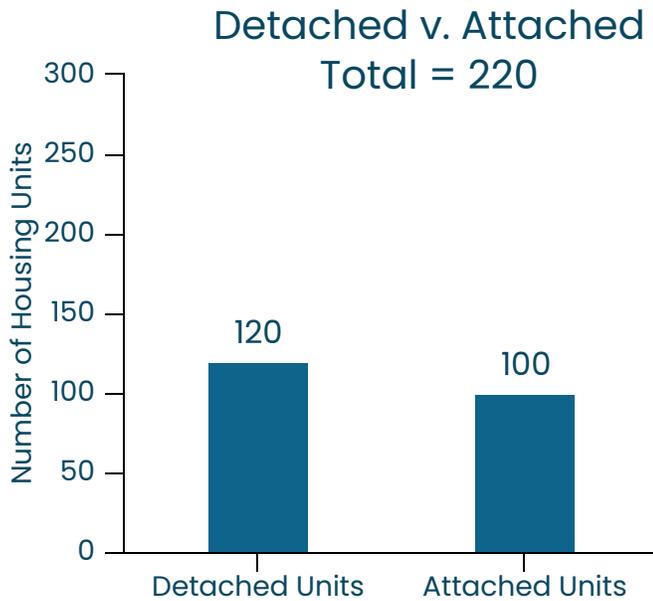
All figures are adjusted upward for the interception of some migrating households that might otherwise bypass the city to choose alternatives in the neighboring City of Tucson.



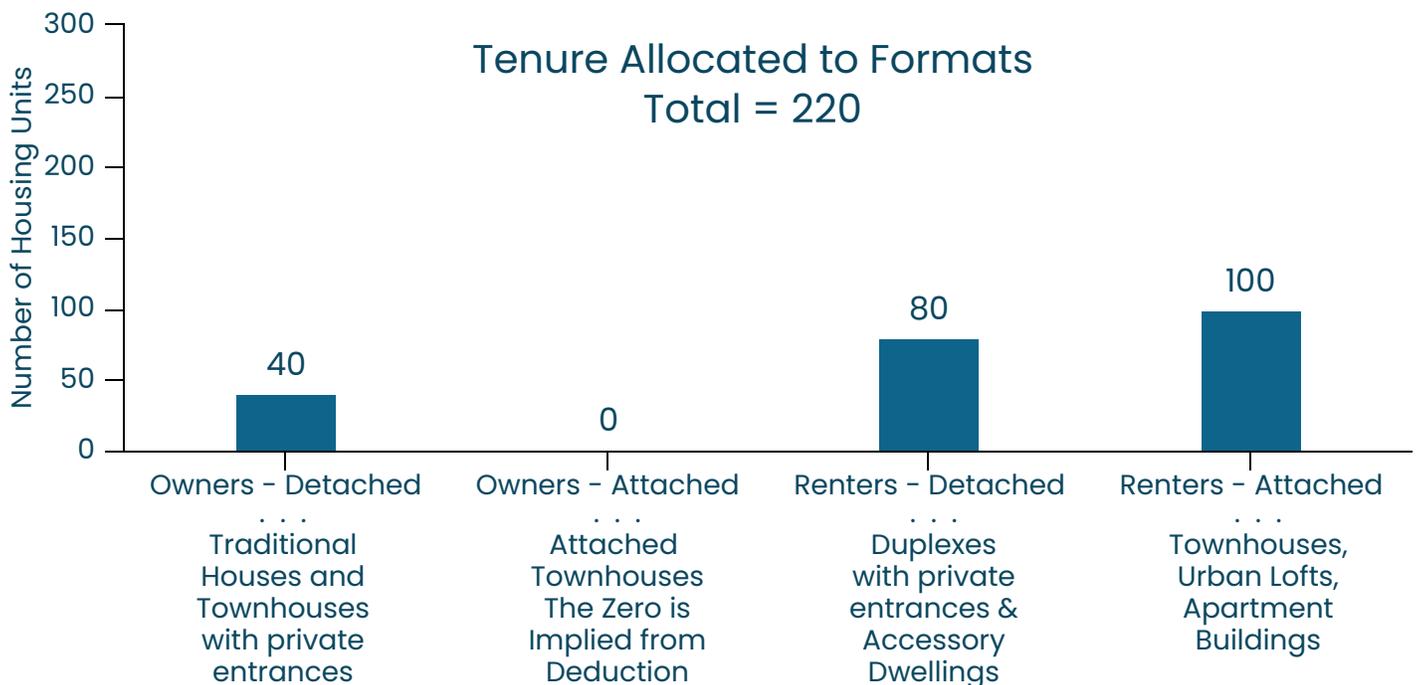
Section B

Annual Market Potential | South Tucson

New Builds Only | Year 2025



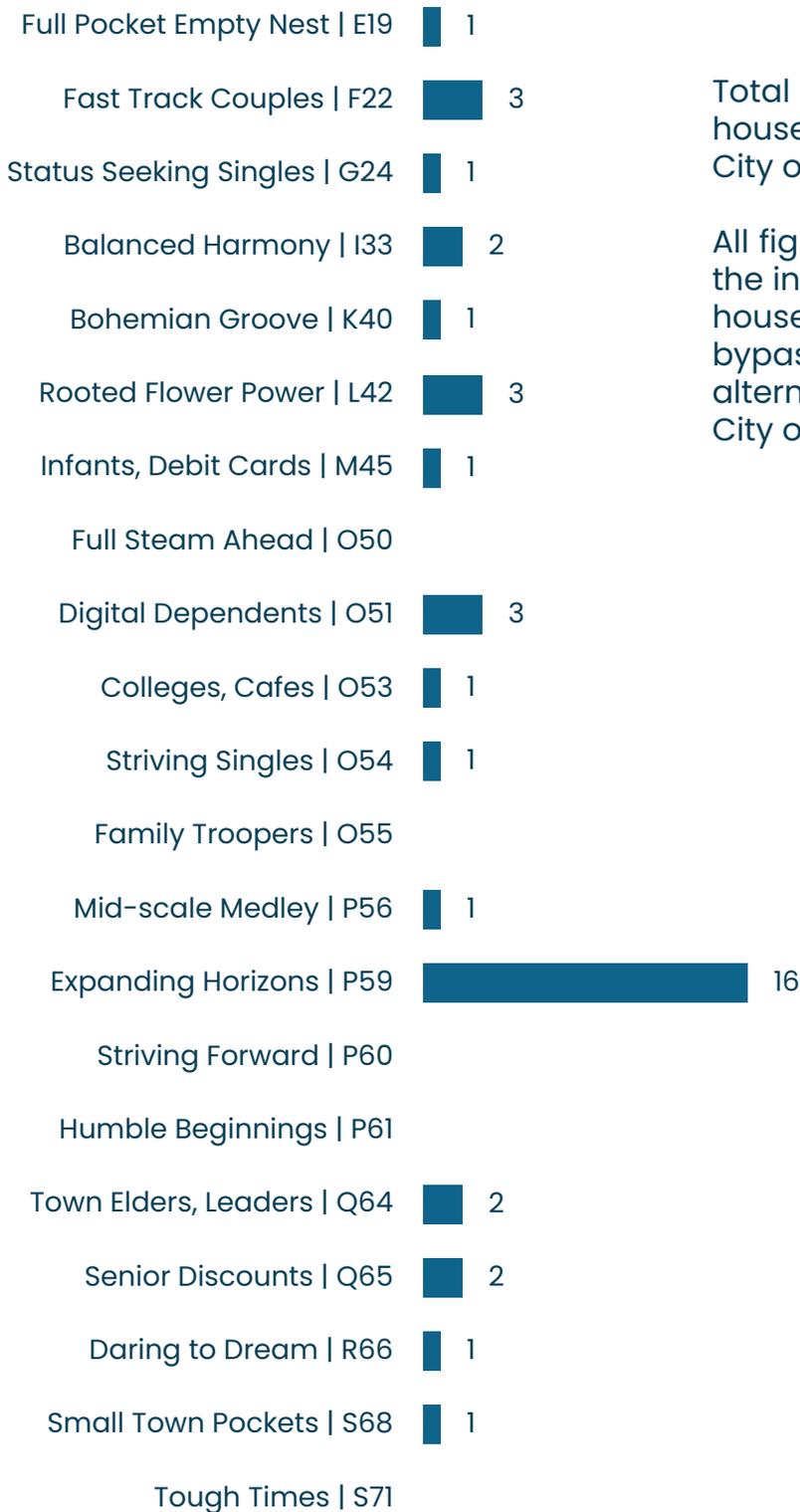
All charts represent the minimum and conservative market potential based on in-migration only, and excluding internal movership. There is a need to CAPTURE these new households that are moving into the City of South Tucson by building new units every year. The figures in the charts include possible diversion and INTERCEPTION of additional households that might otherwise be inclined to move into the neighboring City of Tucson. All figures are unadjusted for out-migration, current vacancies, and competing developments that might be in the construction pipeline.



Source: Target market analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Annual Market Potential | South Tucson

New Owner Target Markets | Yr 2025



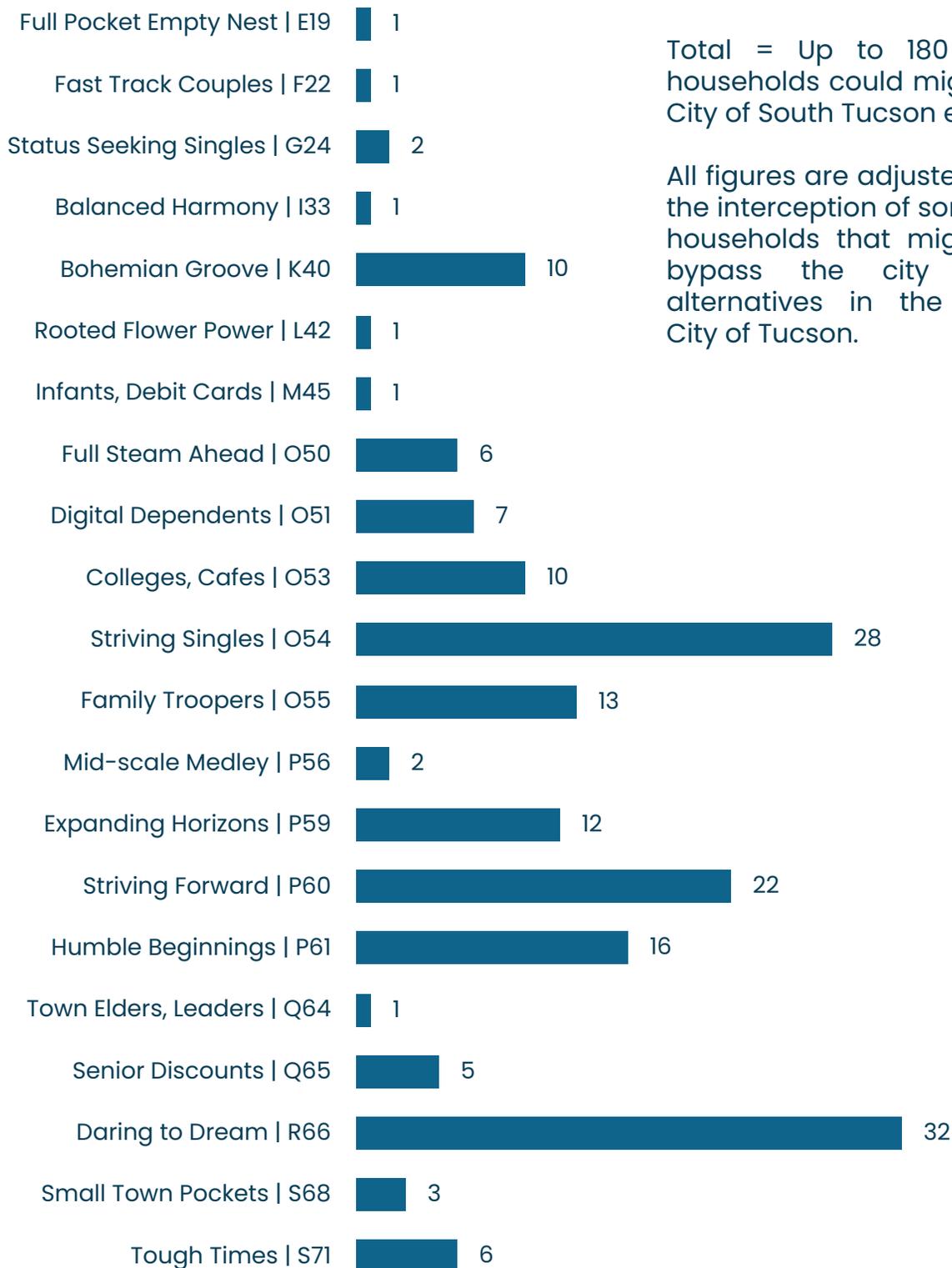
Total = Up to 40 new owner households could migrate into the City of South Tucson each year.

All figures are adjusted upward for the interception of some migrating households that might otherwise bypass the city to choose alternatives in the neighboring City of Tucson.



Annual Market Potential | South Tucson

New Renter Target Markets | Yr 2025



Total = Up to 180 new renter households could migrate into the City of South Tucson each year.

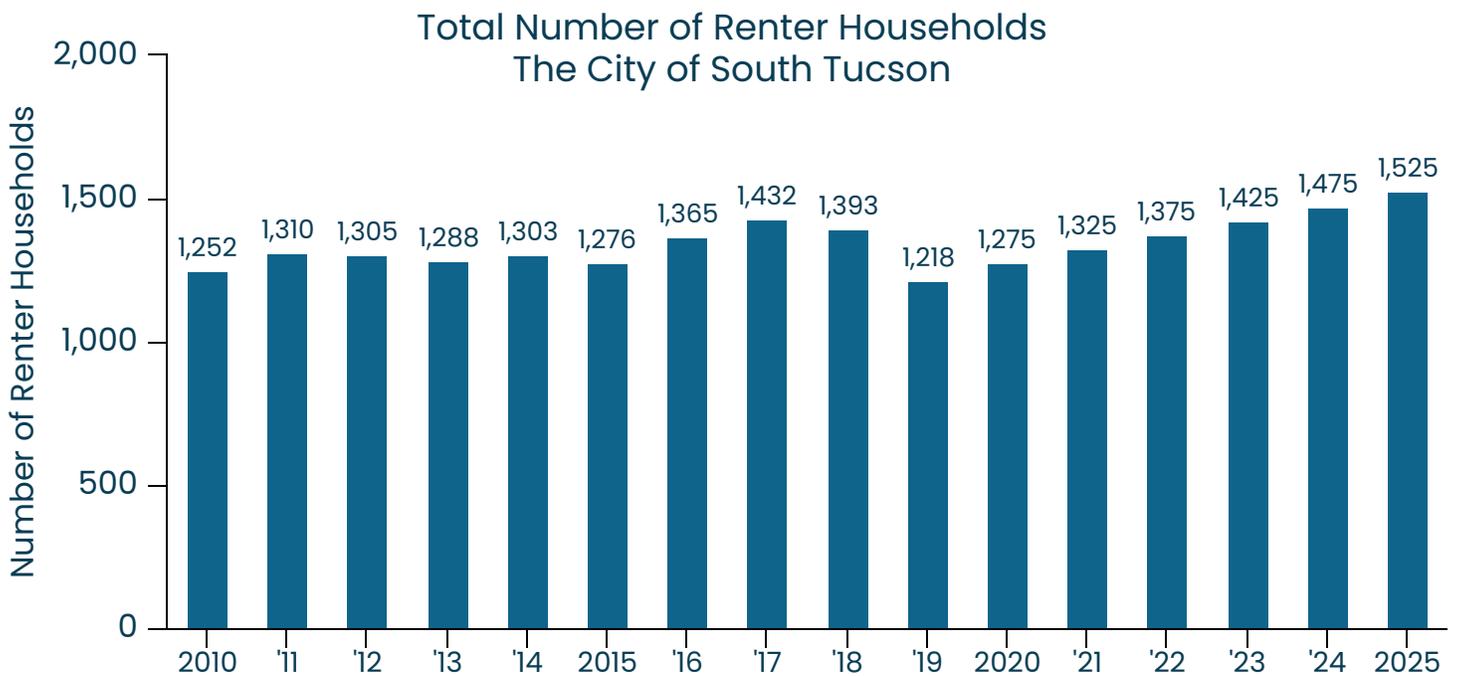
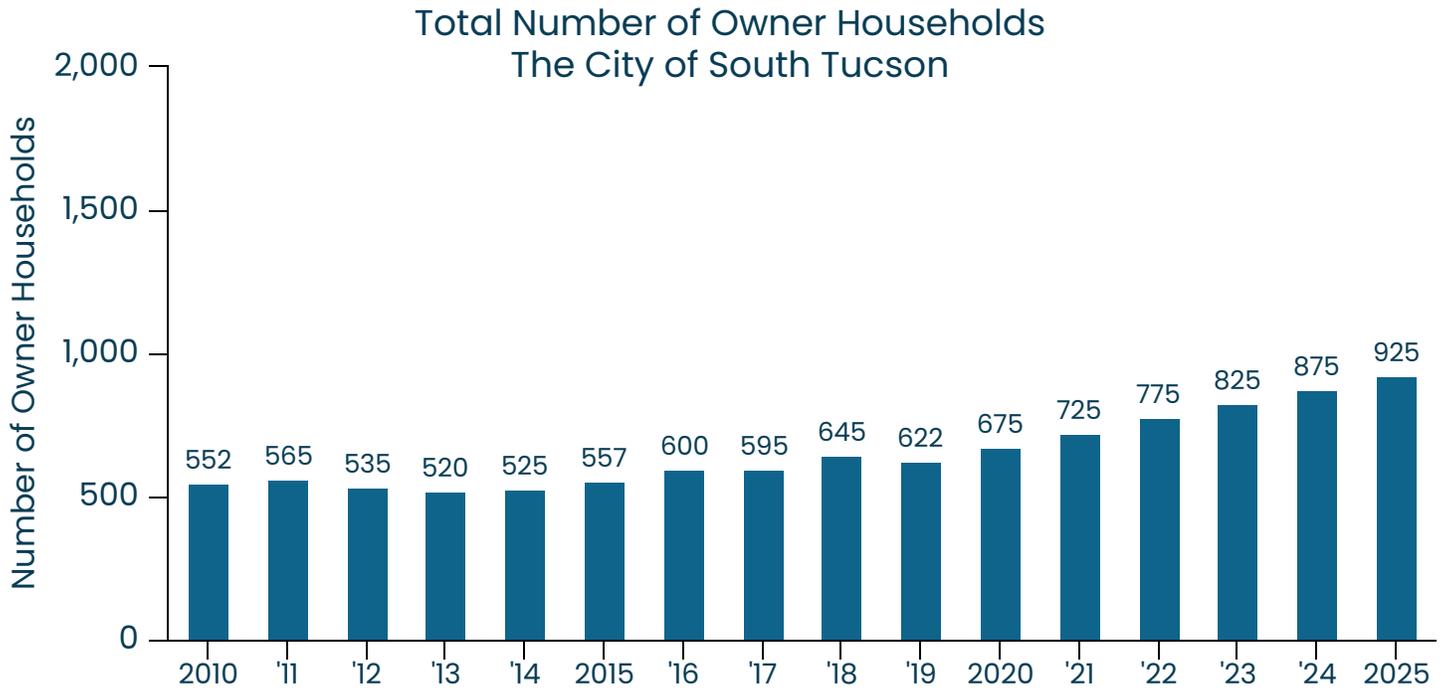
All figures are adjusted upward for the interception of some migrating households that might otherwise bypass the city to choose alternatives in the neighboring City of Tucson.



Section C

Households by Tenure | South Tucson

The total number of existing owner and renter households (i.e., occupied units).

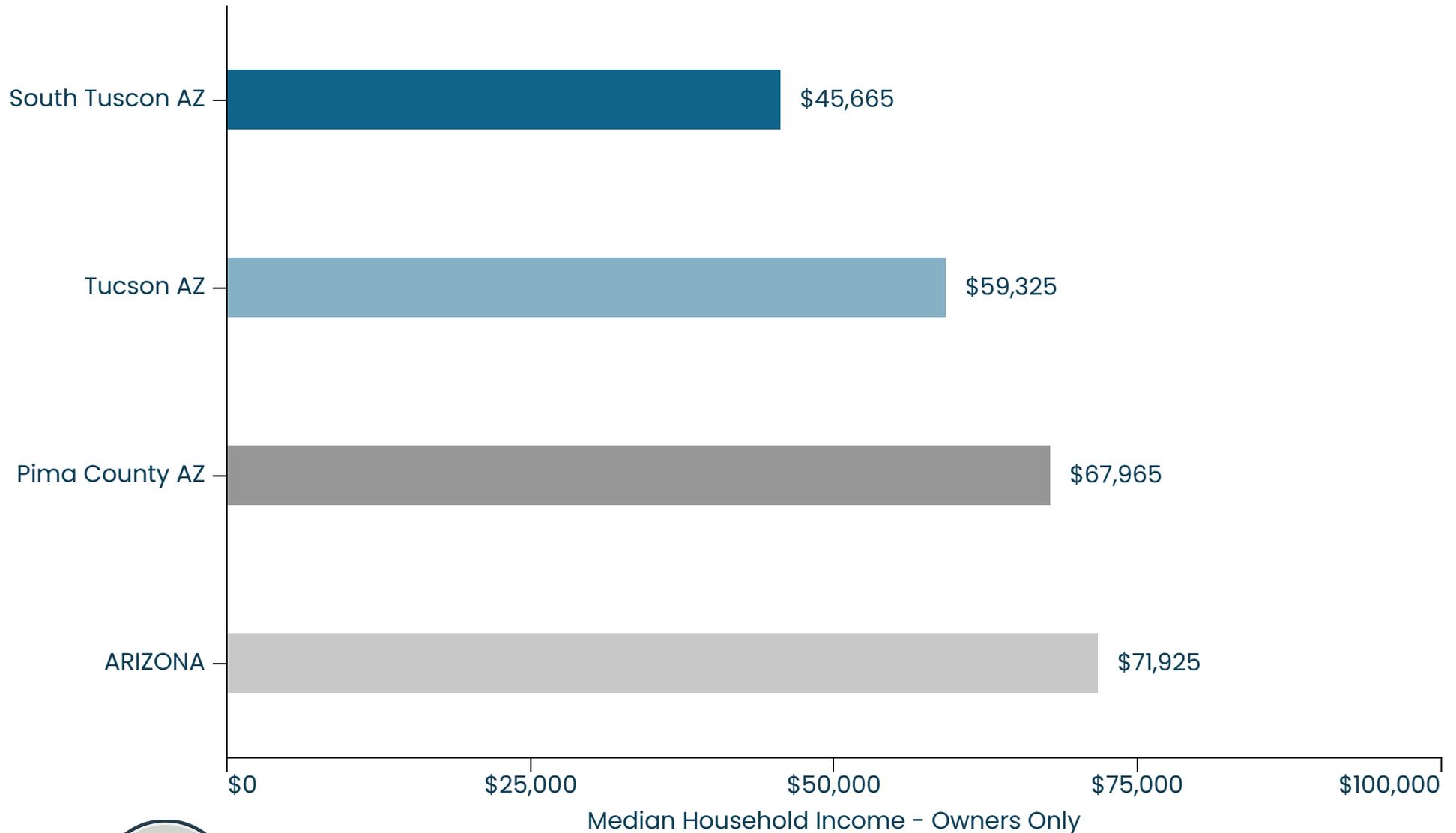


Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.



Median Household Income | Owners Only

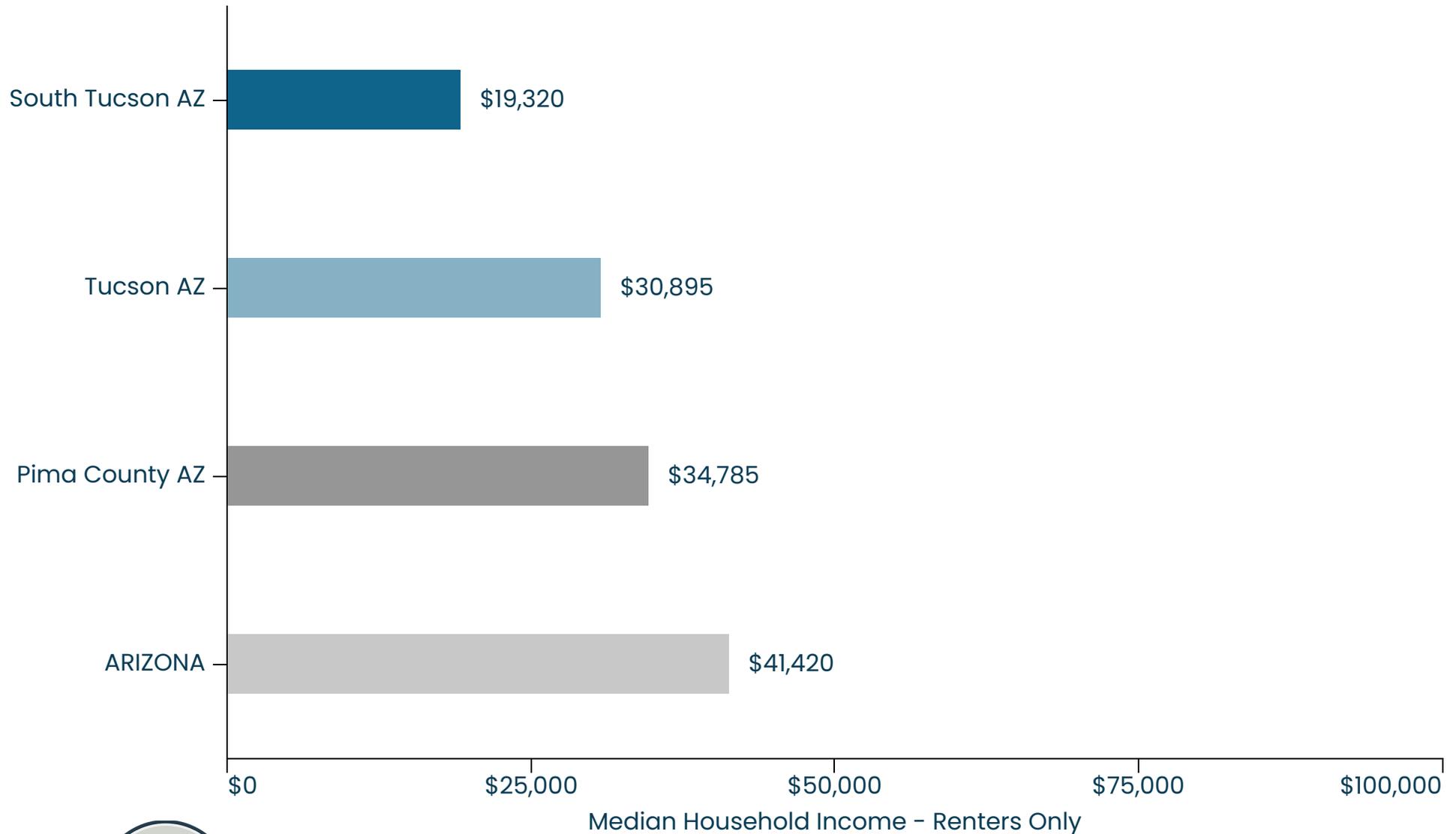
The City of South Tucson | 2019



Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Median Household Income | Renters Only

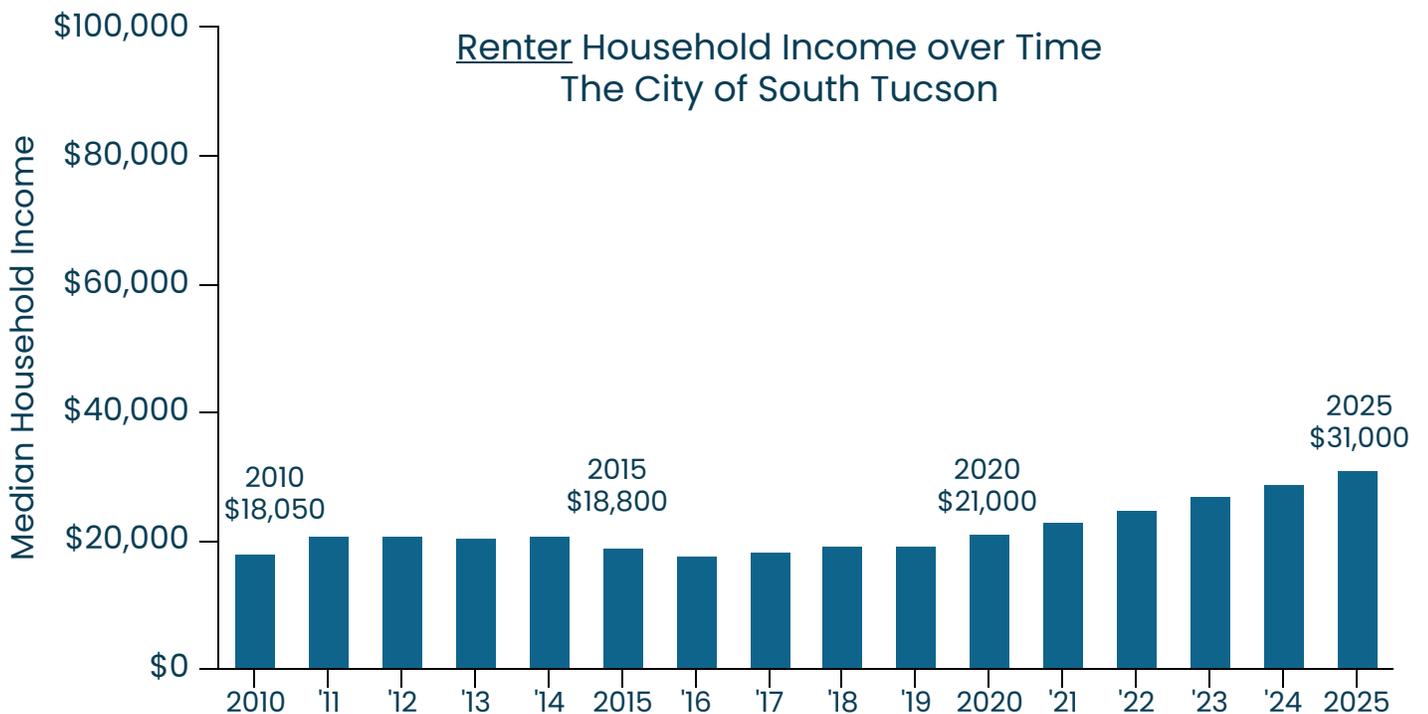
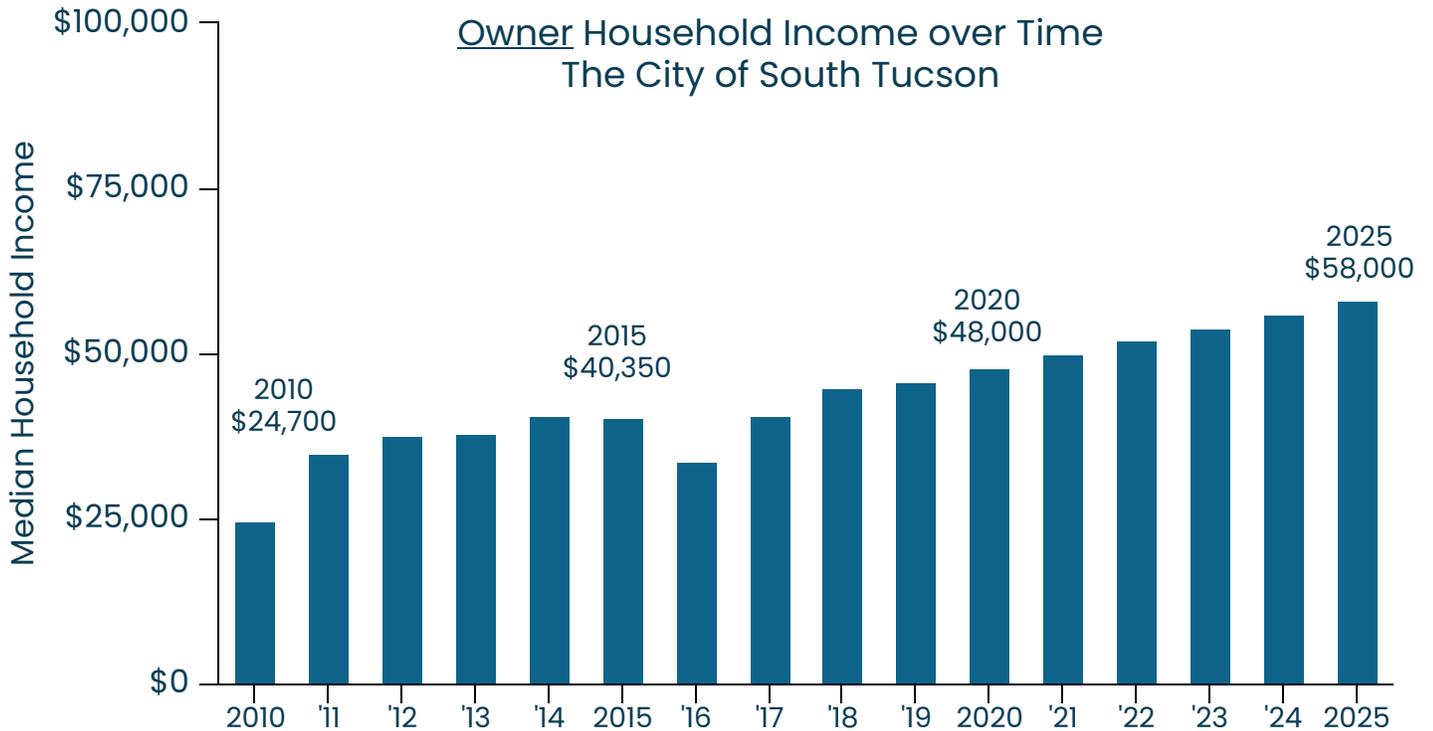
The City of South Tucson | 2019



Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Hhld Income over Time | South Tucson

Household income by tenure is used to forecast price tolerances for housing units.

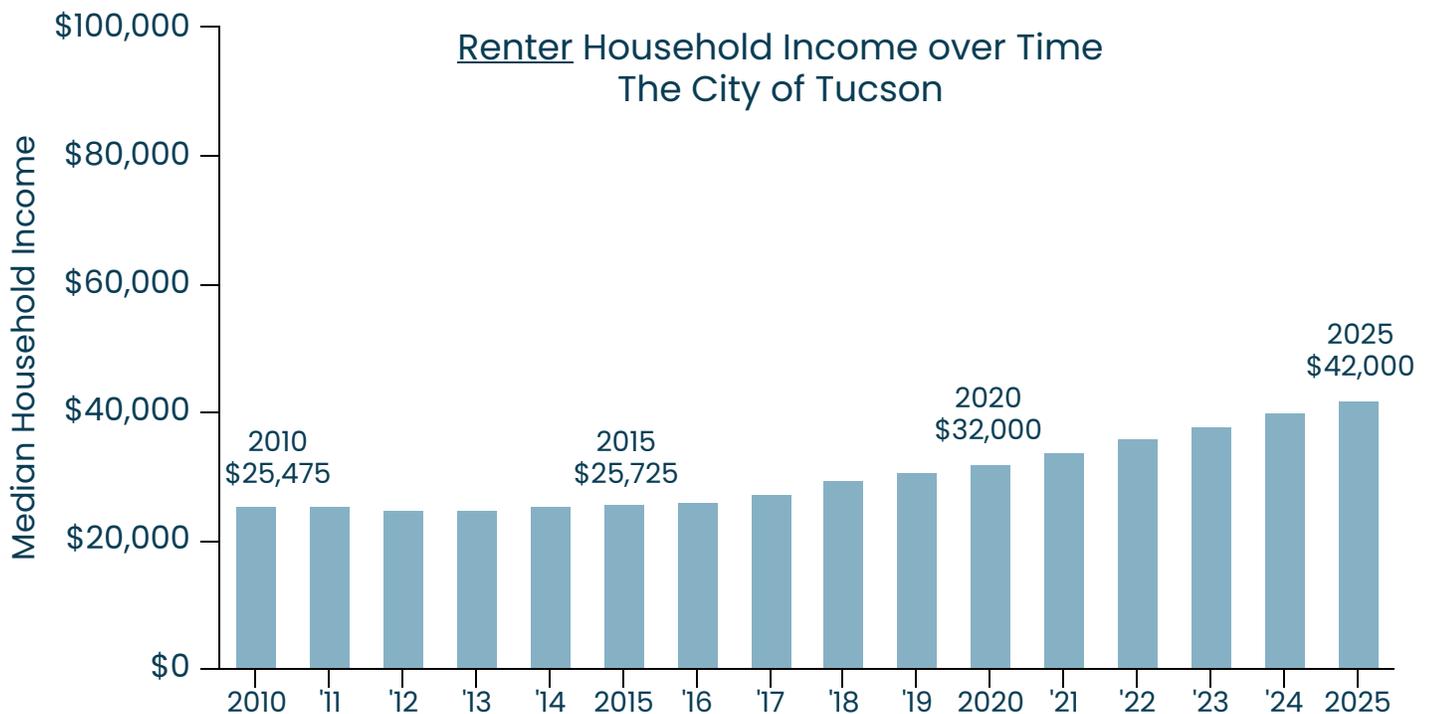
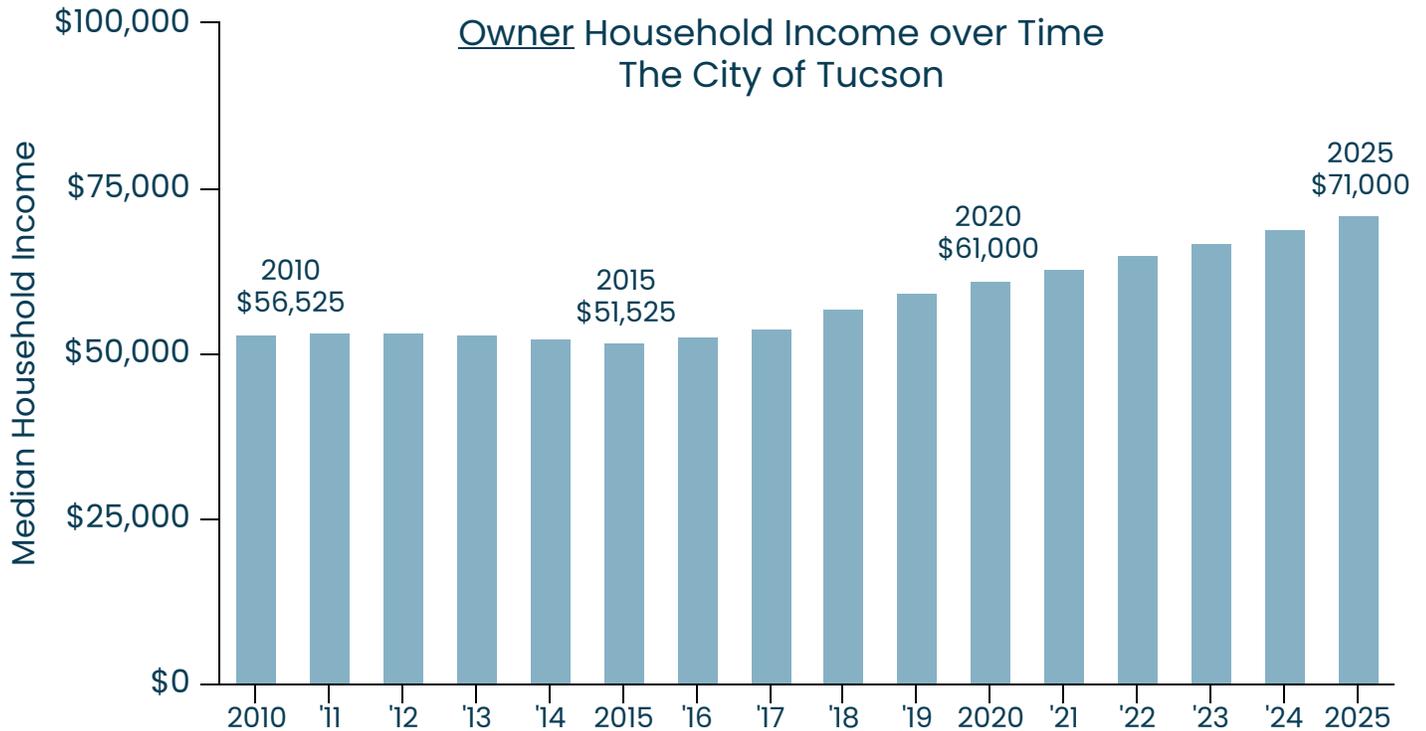


Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.



Hhld Income over Time | Tucson

Household income by tenure is used to forecast price tolerances for housing units.



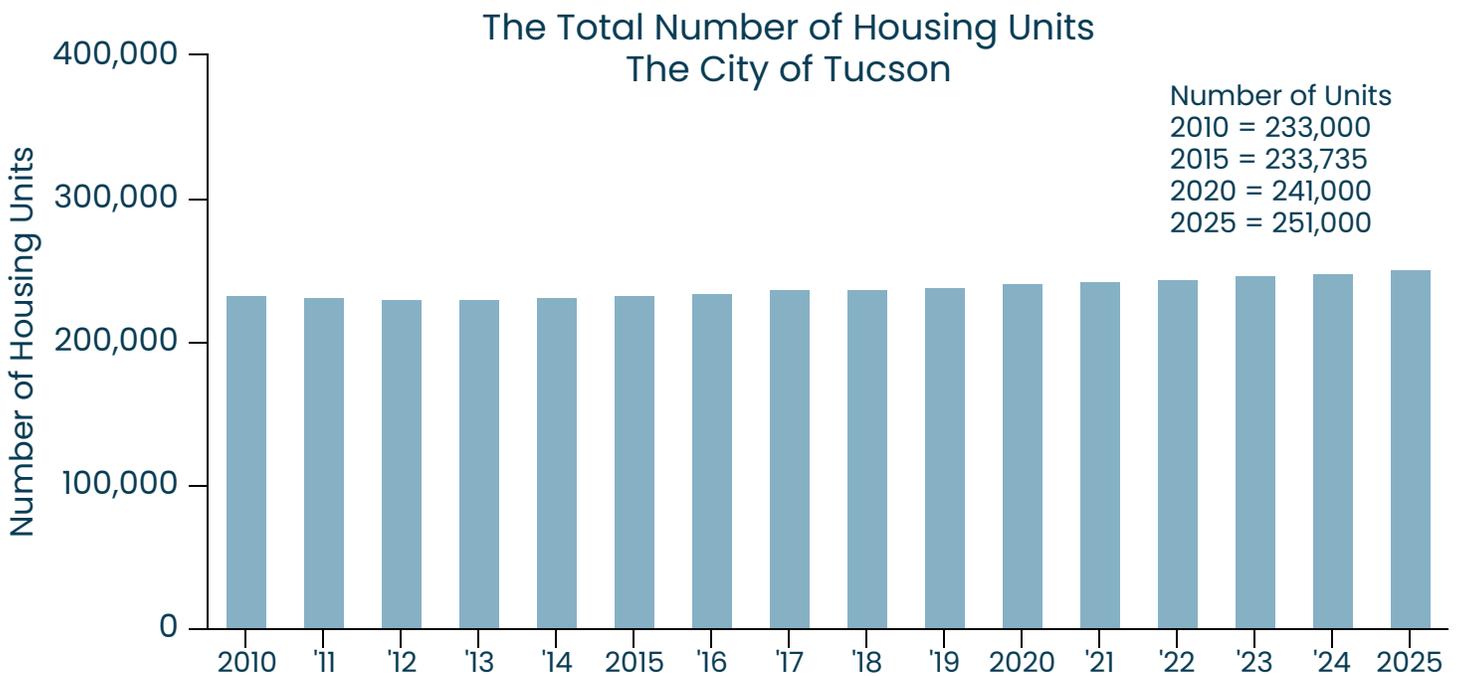
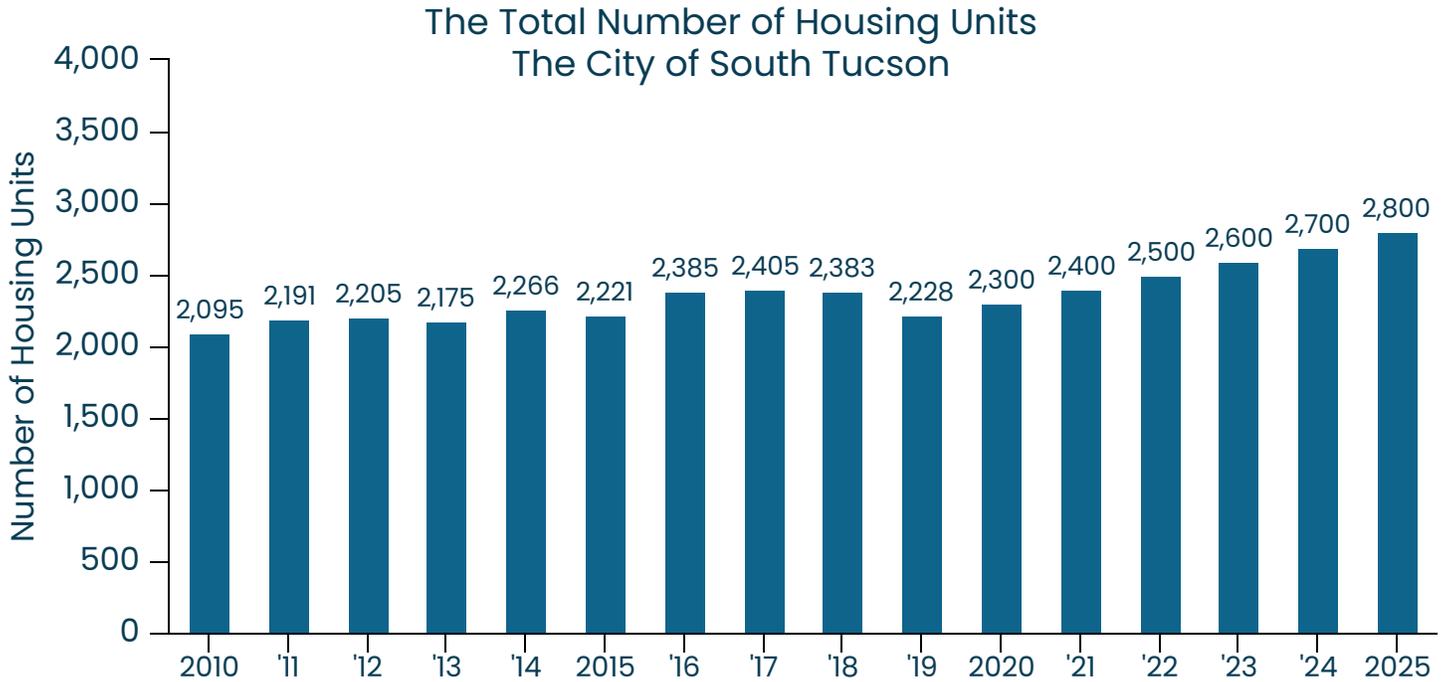
Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.



Section D

Number of Housing Units | South Tucson

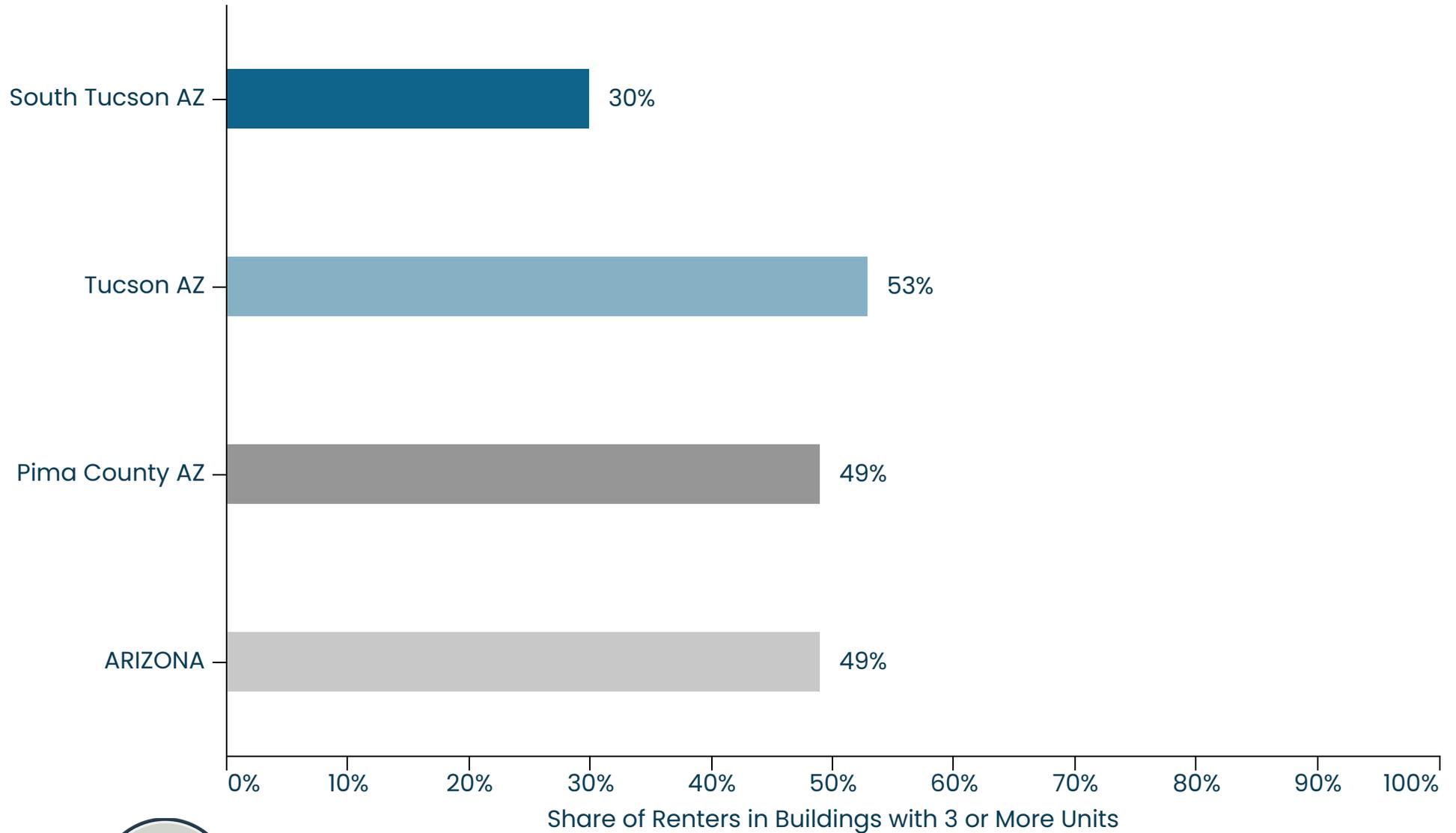
The total number of existing housing units, occupied and vacant combined.



Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.



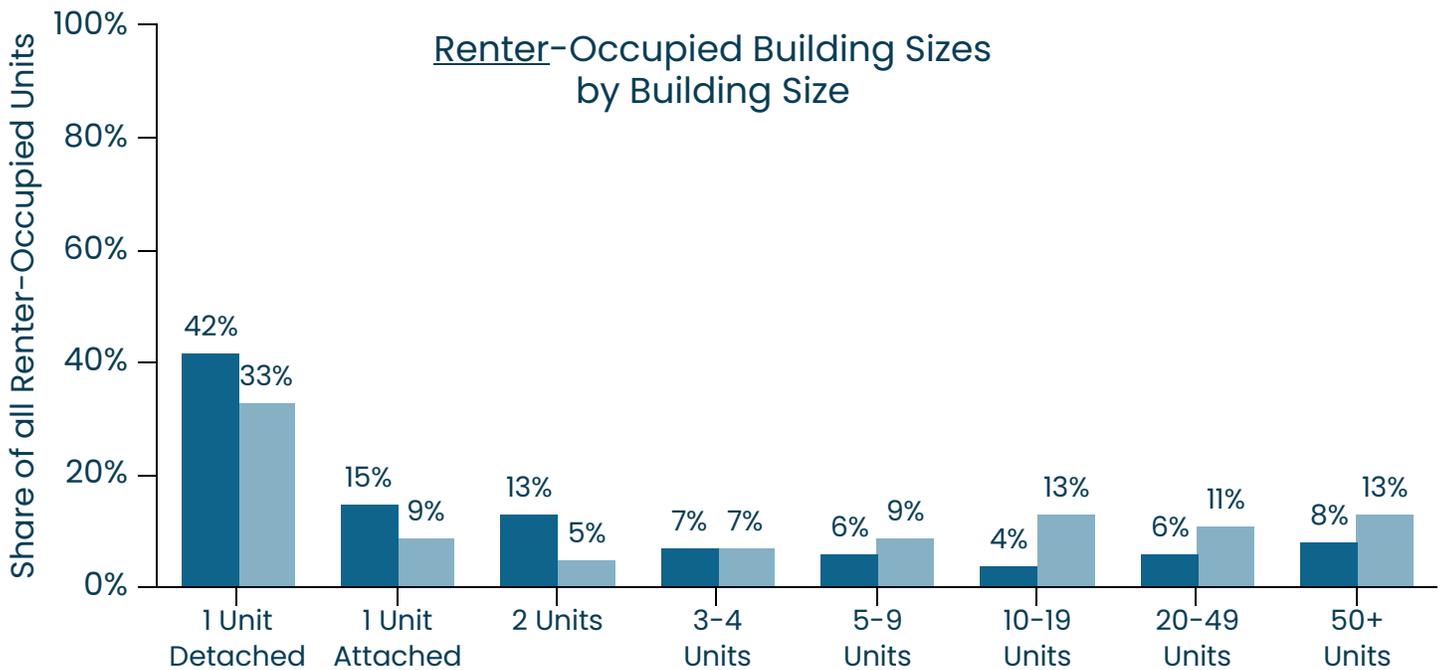
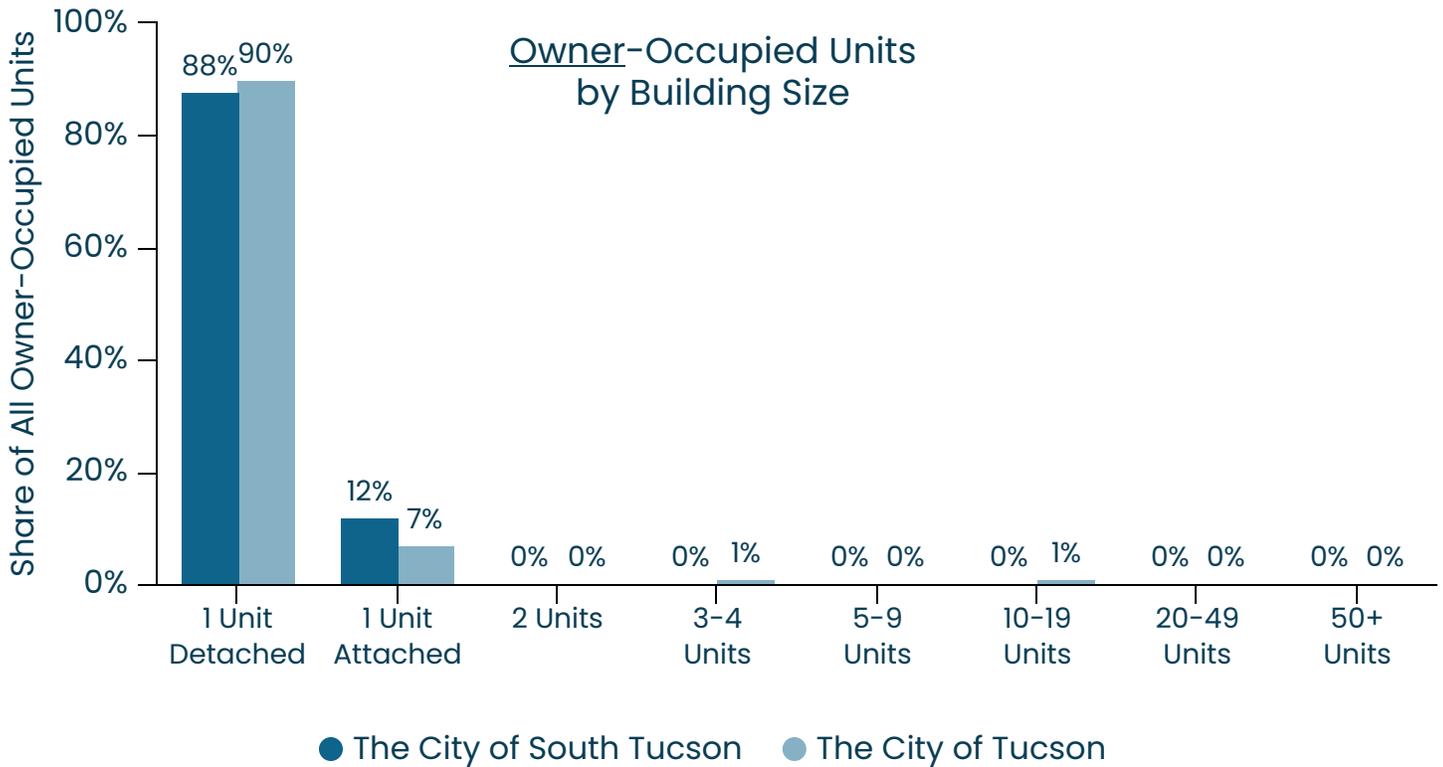
Share of Renter-Occupied Households | 3+ Units The City of South Tucson | 2019



Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Units by Building Size | South Tucson

The share of existing number of existing units by tenure and by building size.

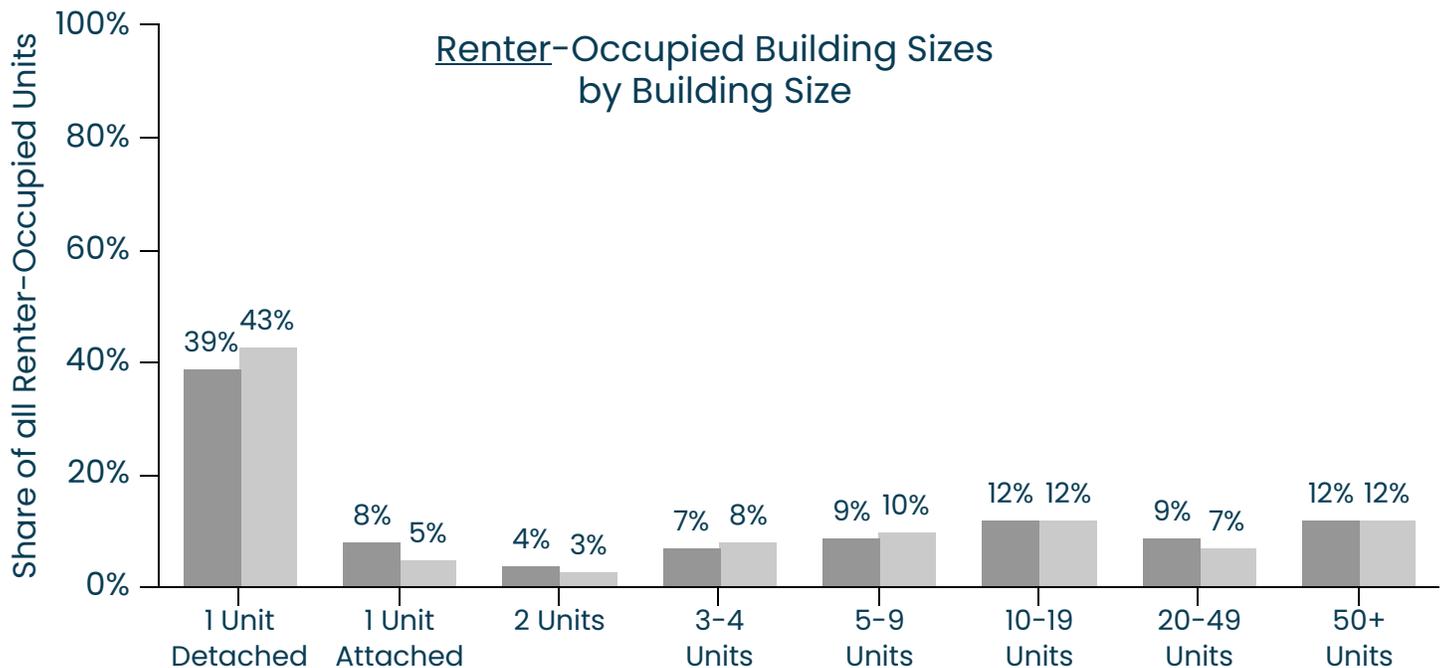
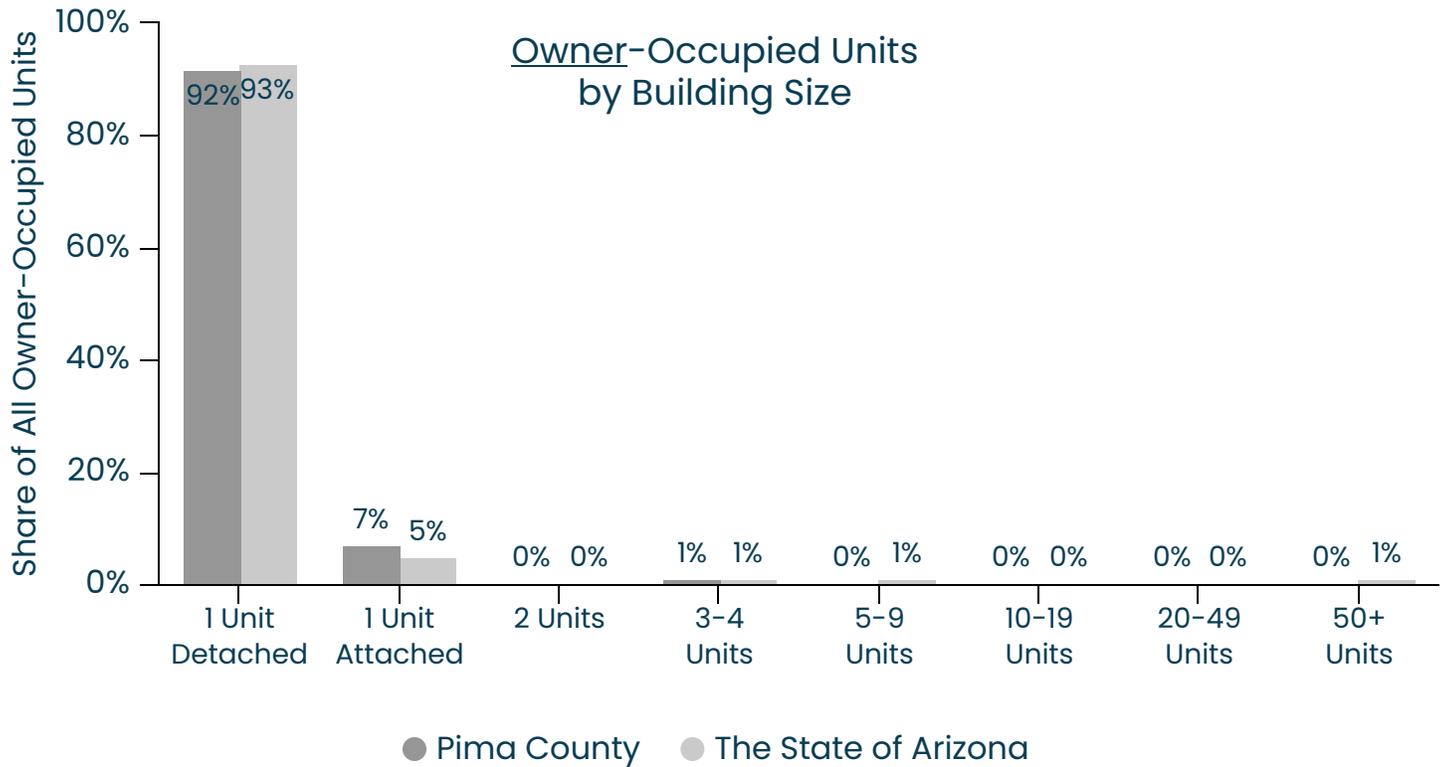


Underlying data by the Decennial Census and American Community Survey (ACS) with five-year estimates through the year 2019. Analysis, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.



Units by Building Size | Pima County

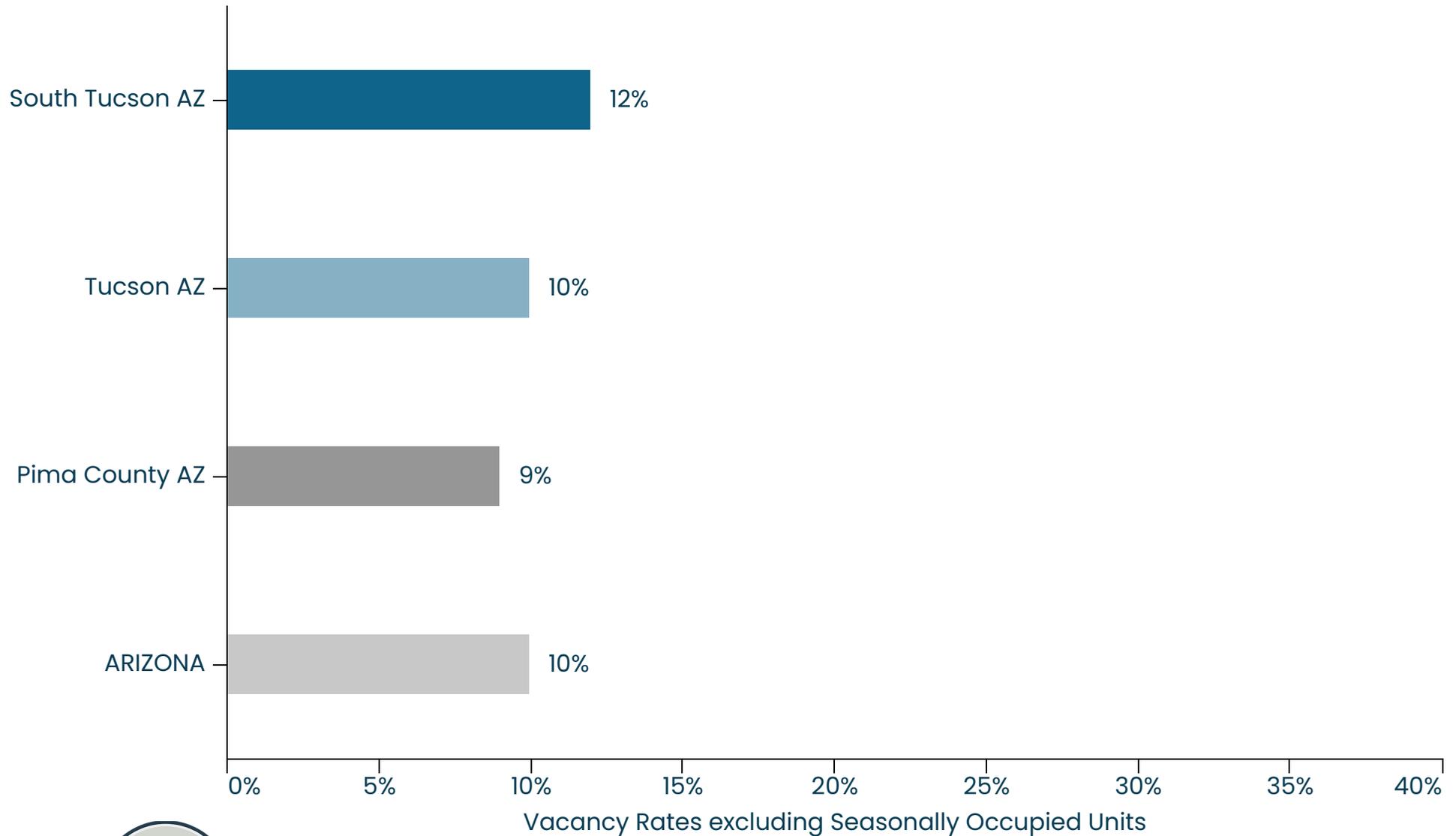
The share of existing number of existing units by tenure and by building size.



Underlying data by the Decennial Census and American Community Survey (ACS) with five-year estimates through the year 2019. Analysis, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.



Vacancy Rates excluding Seasonally Occupied Units The City of South Tucson | 2019



Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Vacancies by Tenure | South Tucson

A geographic comparison of housing vacancies by tenure and over time.

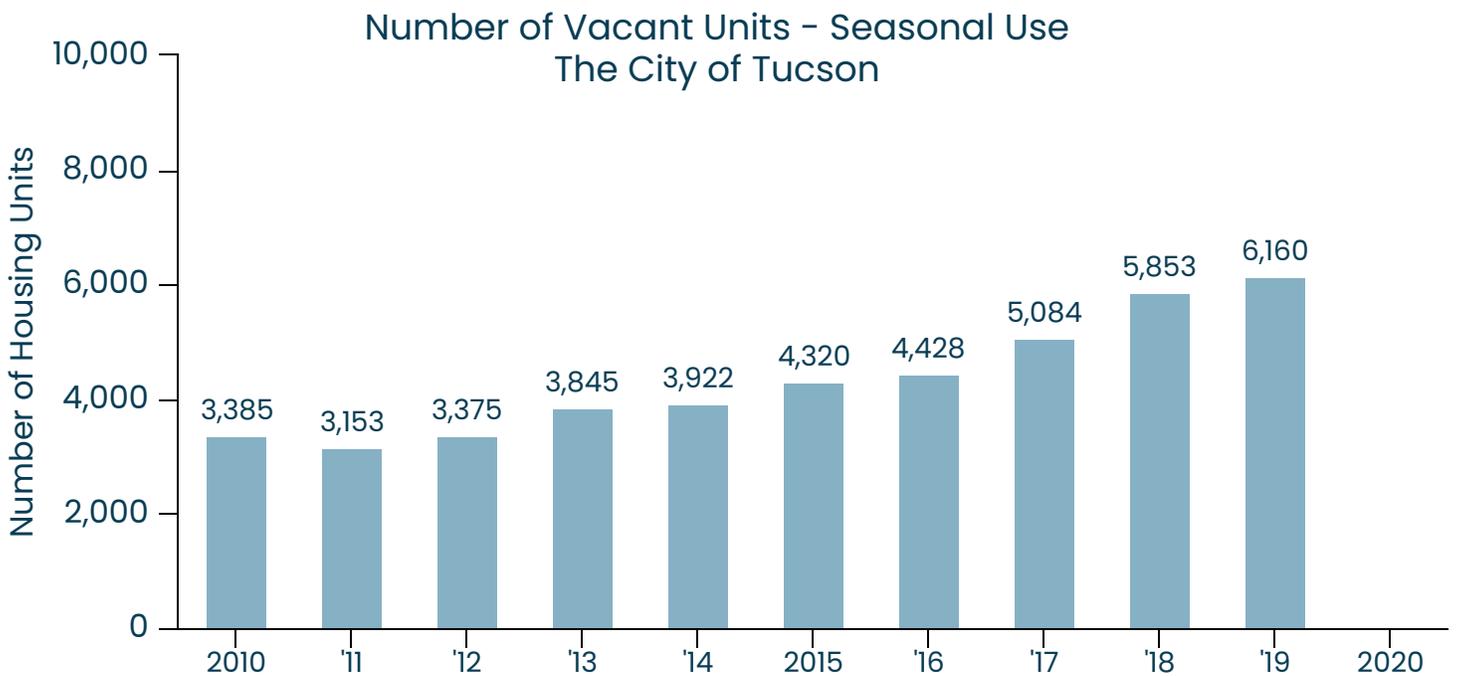
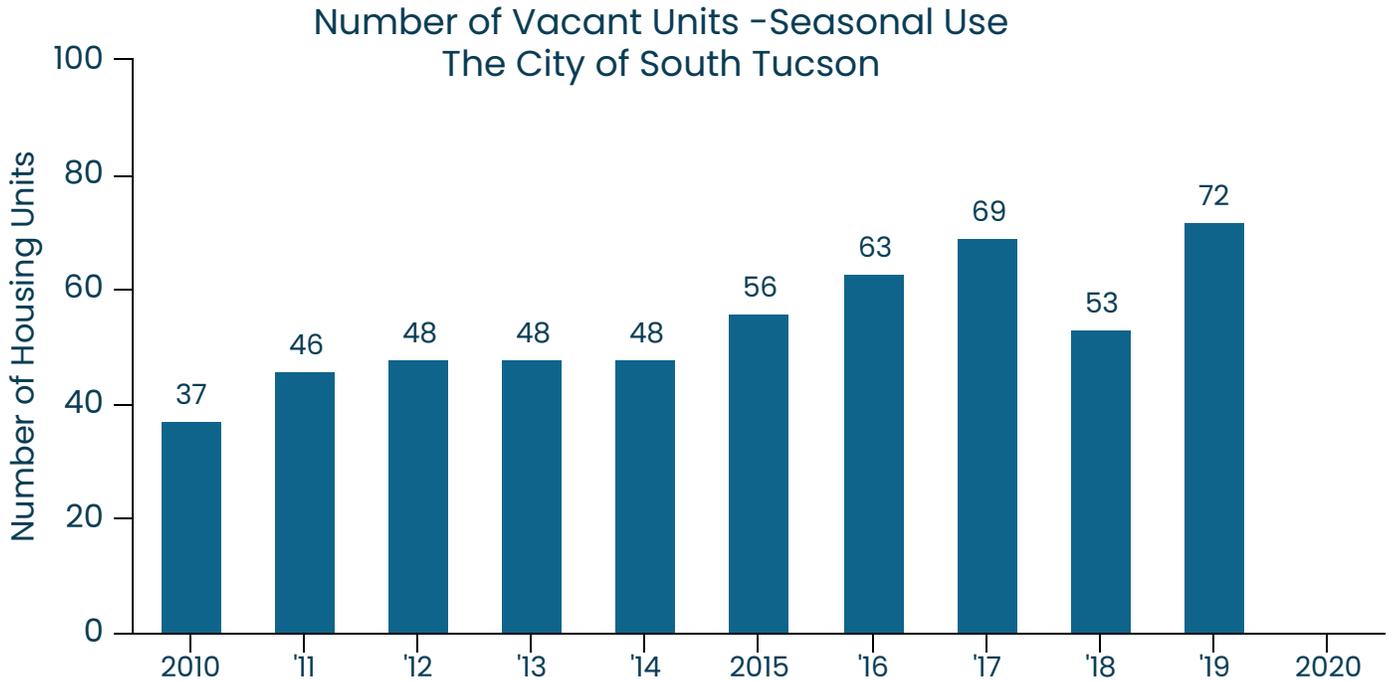


Underlying data by the Decennial Census and American Community Survey through the year 2019. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2020 - 2021.



Seasonal Vacancies | South Tucson

Number of vacant units attributed to seasonal, recreational, occasional use.



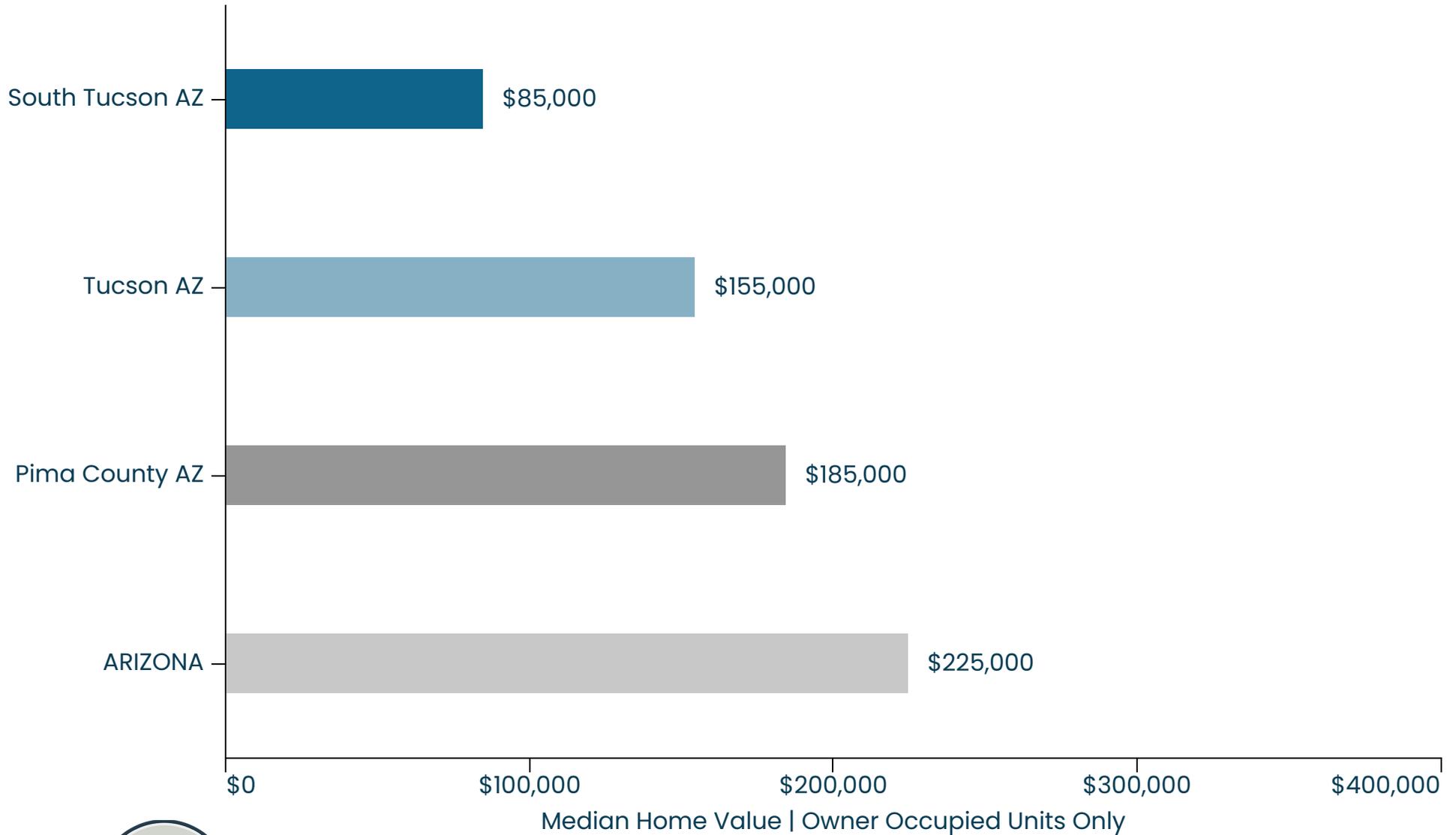
Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.



Section E

Median Home Value | Owner-Occupied Units Only

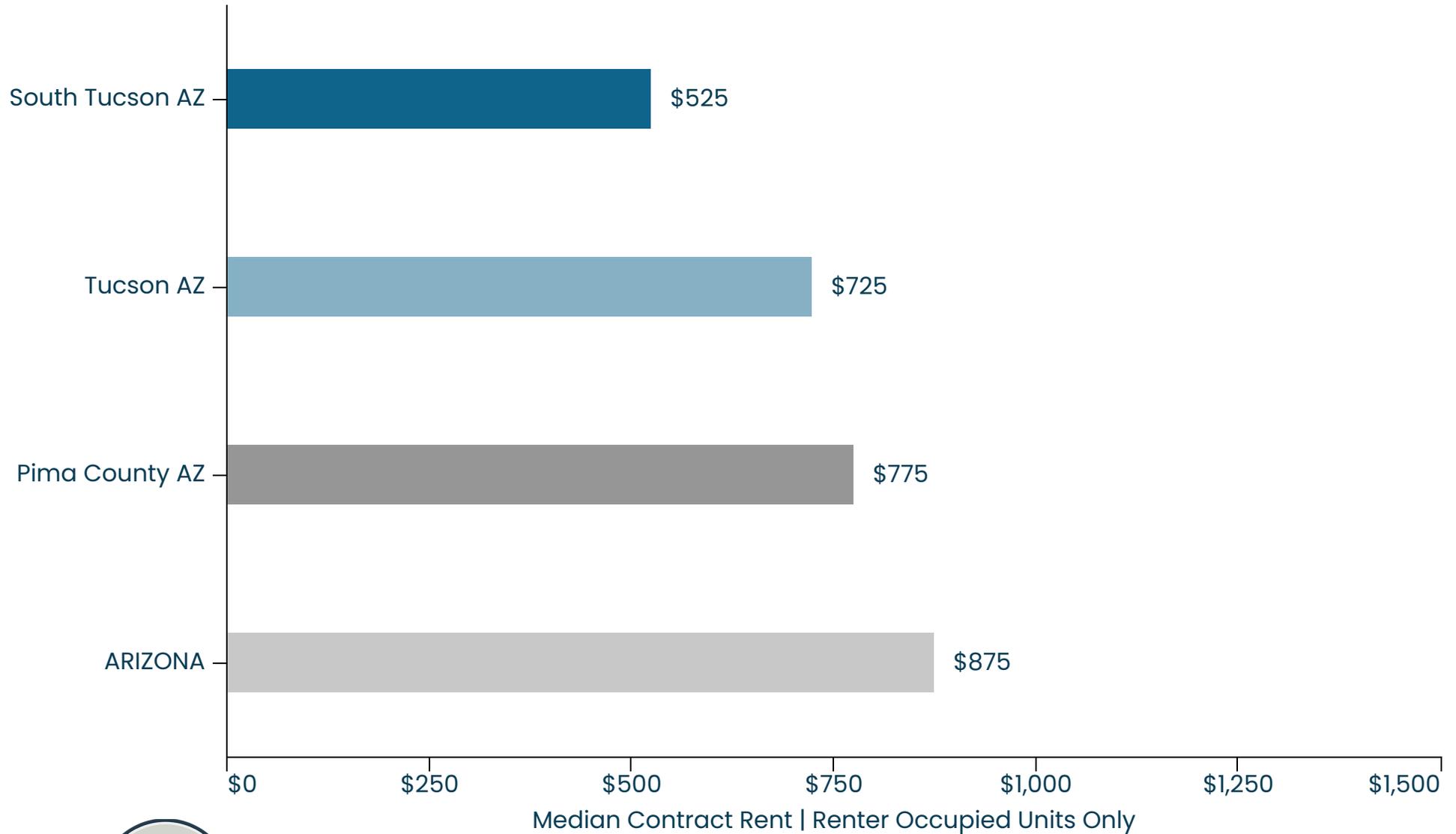
The City of South Tucson | 2019



Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Median Contract Rent | Renter-Occupied Units Only

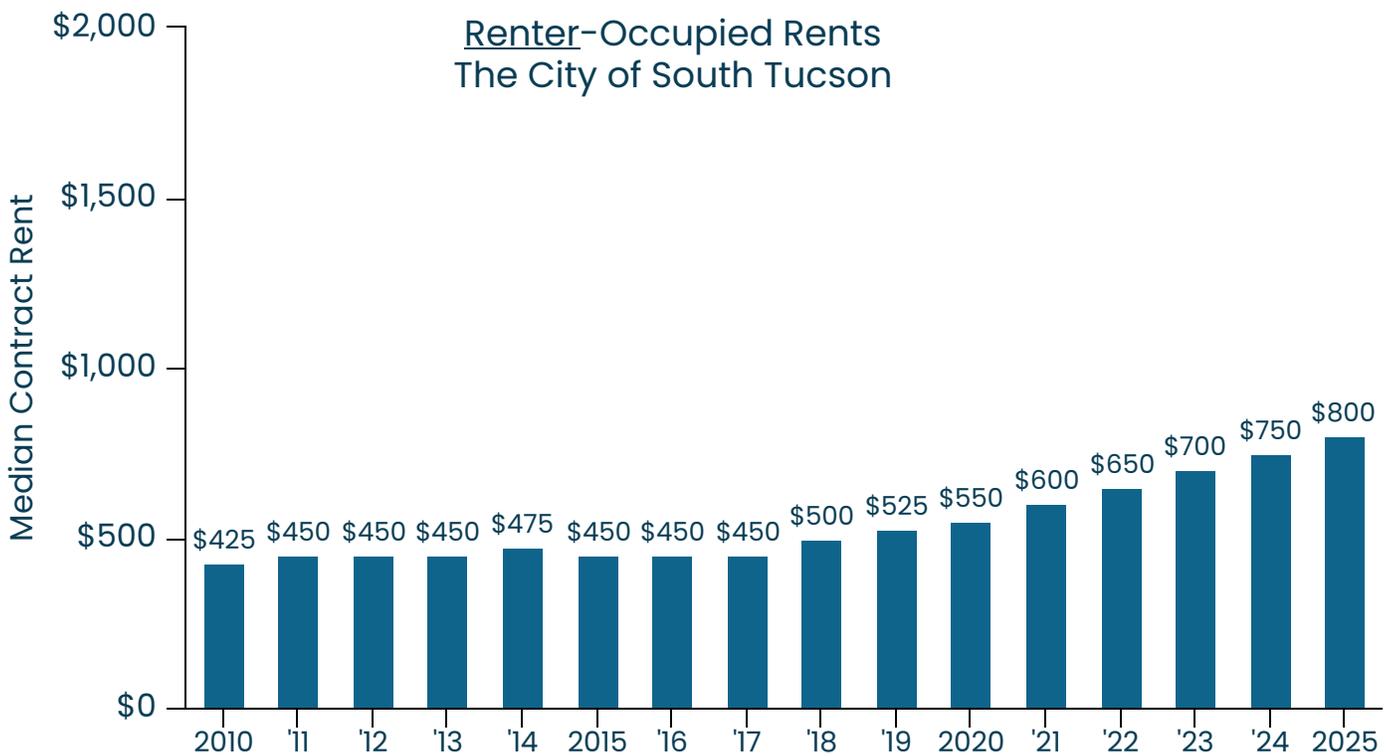
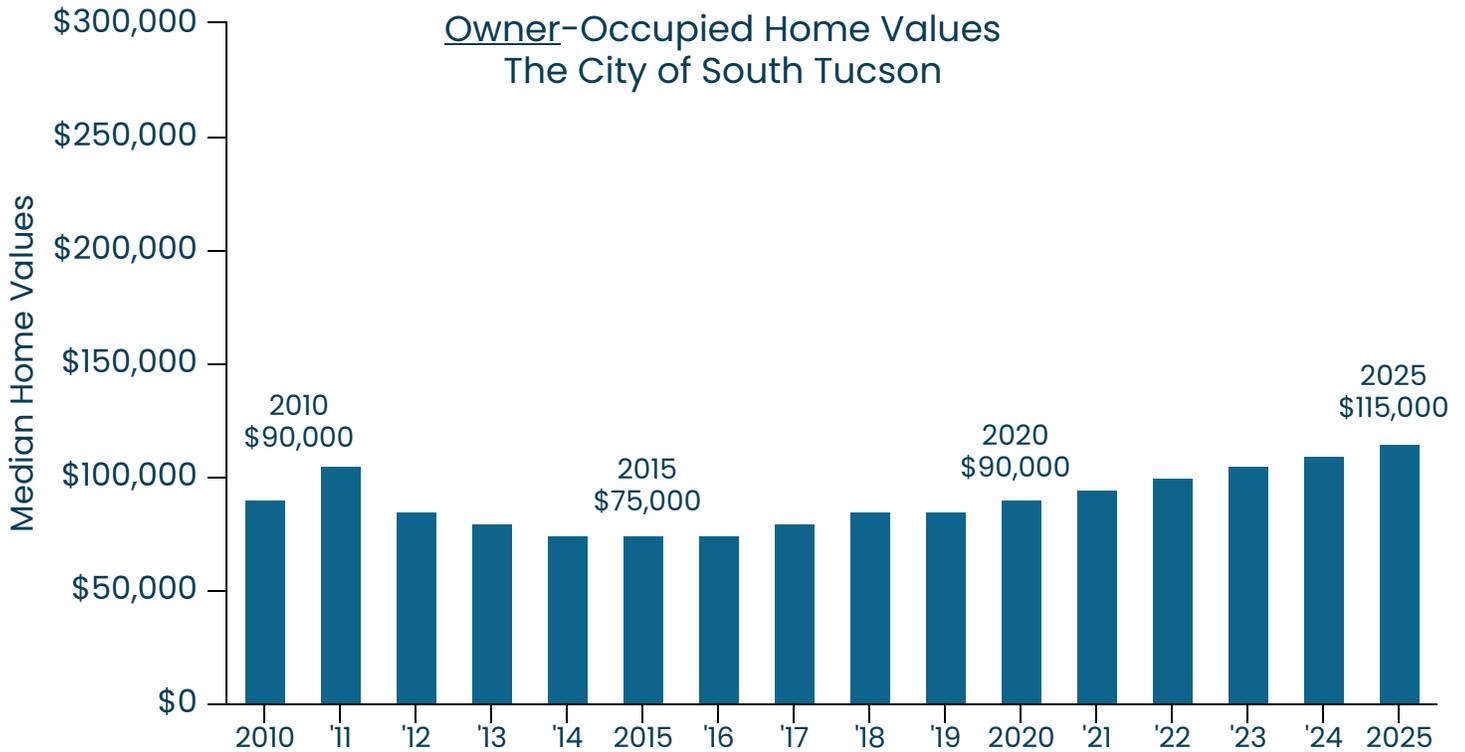
The City of South Tucson | 2019



Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Values, Rents Over Time | South Tucson

Median prices of existing units are used to help forecast the prices of new units.

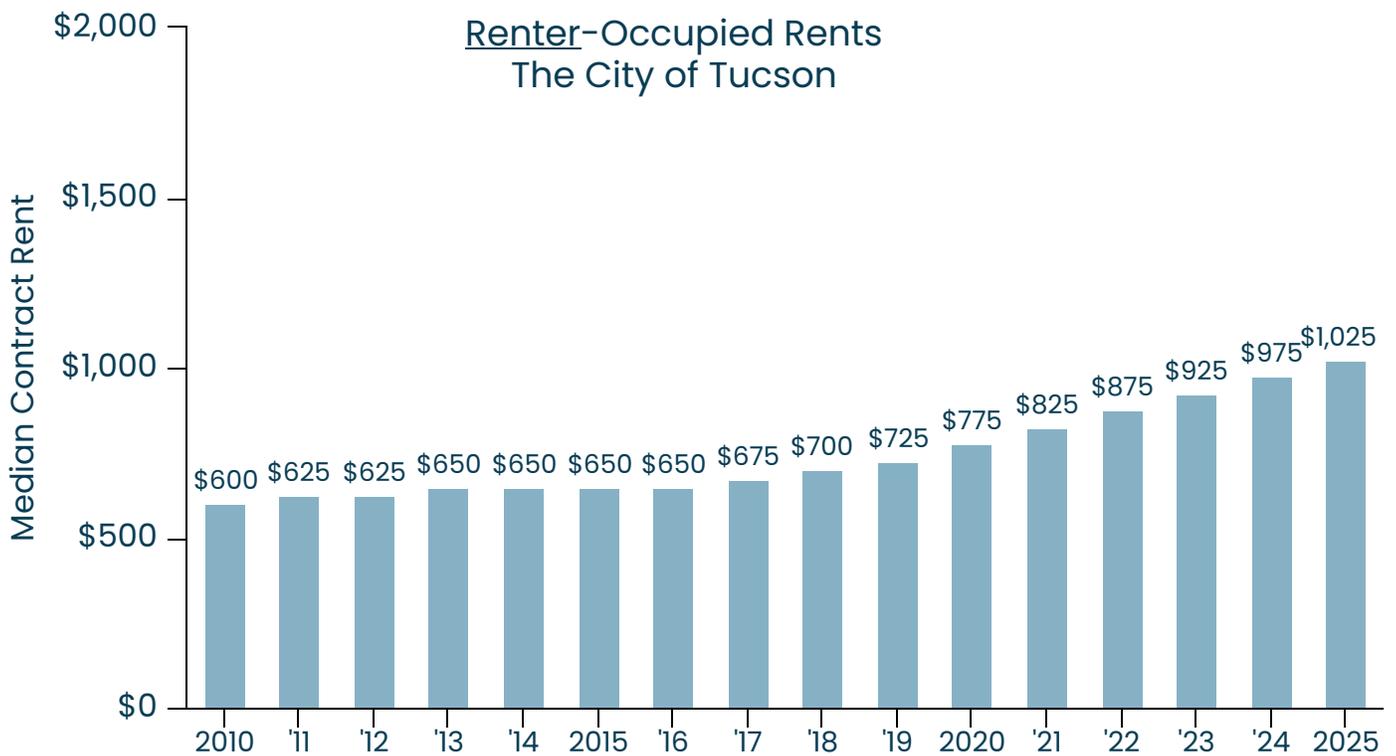
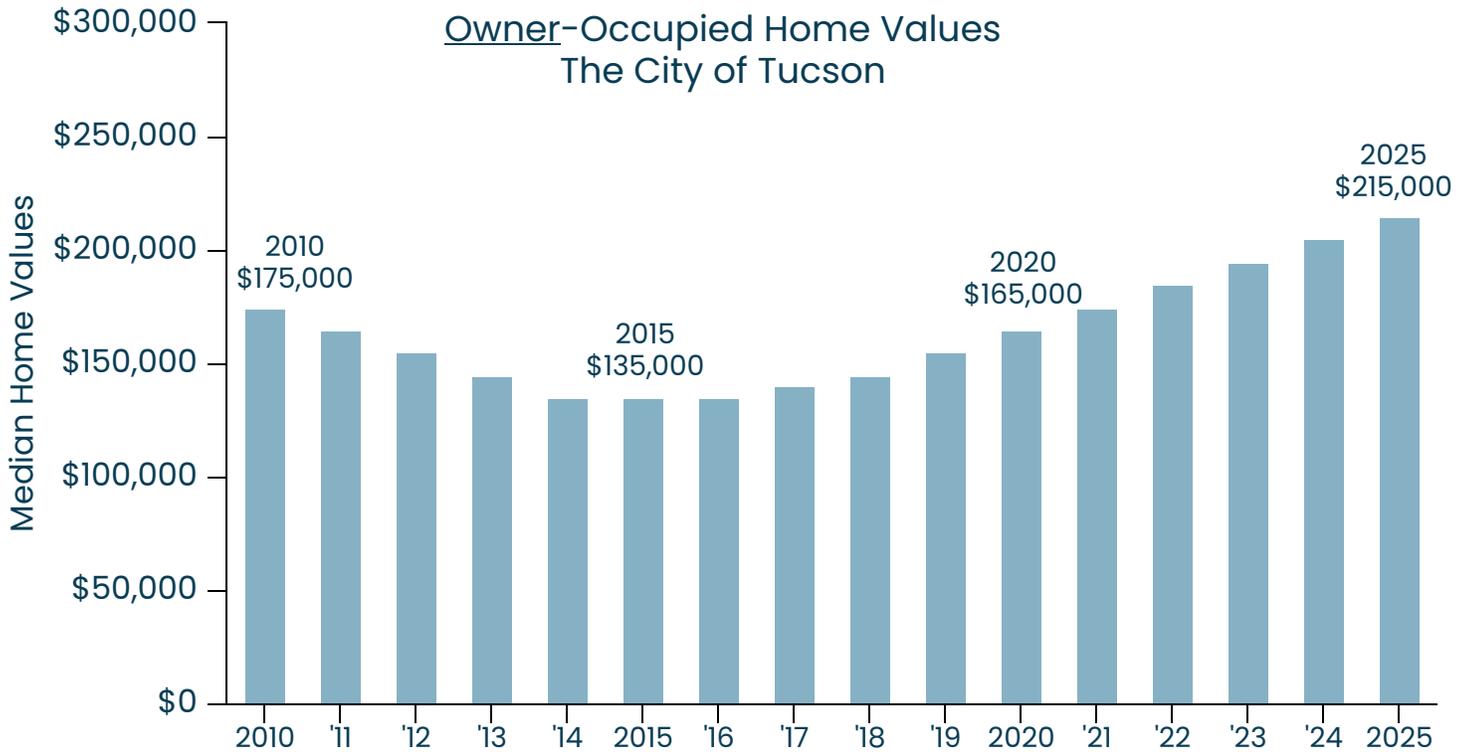


Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.



Values, Rents Over Time | Tucson

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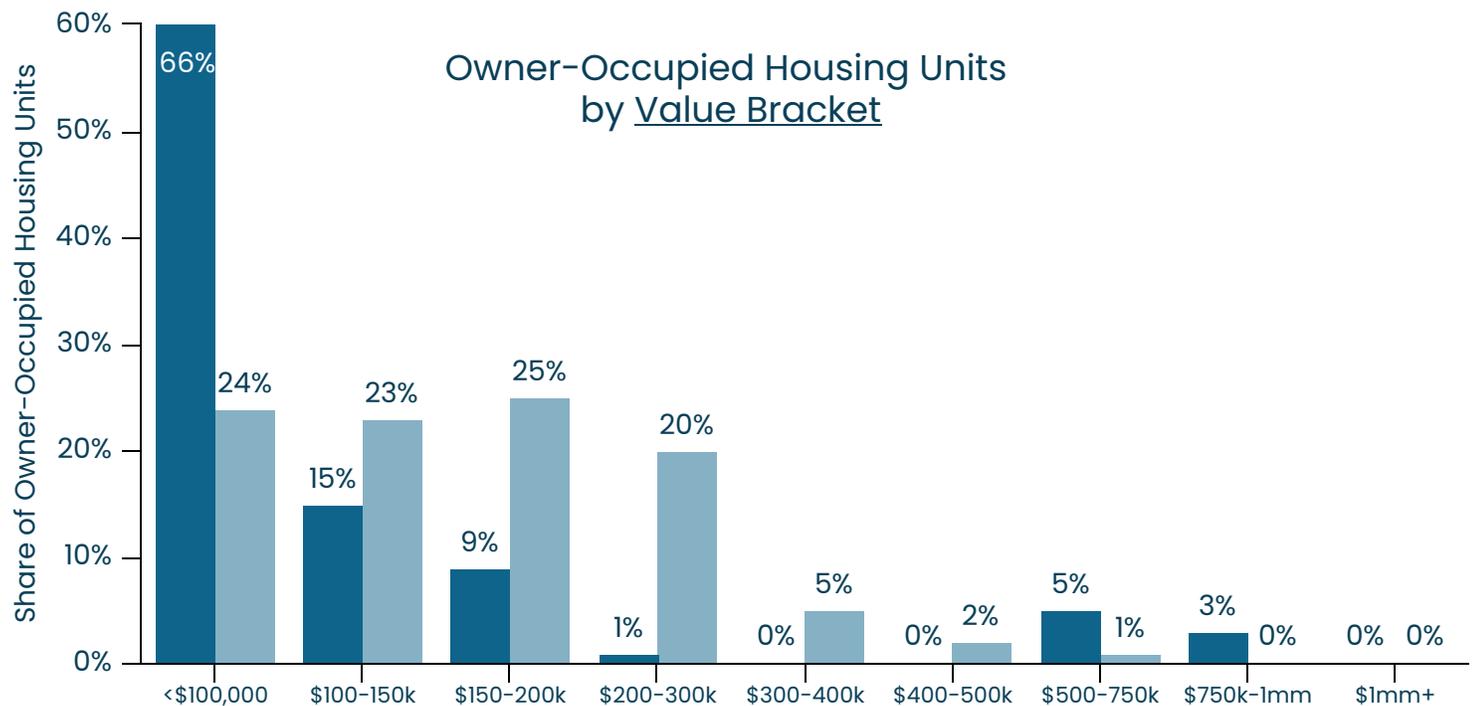
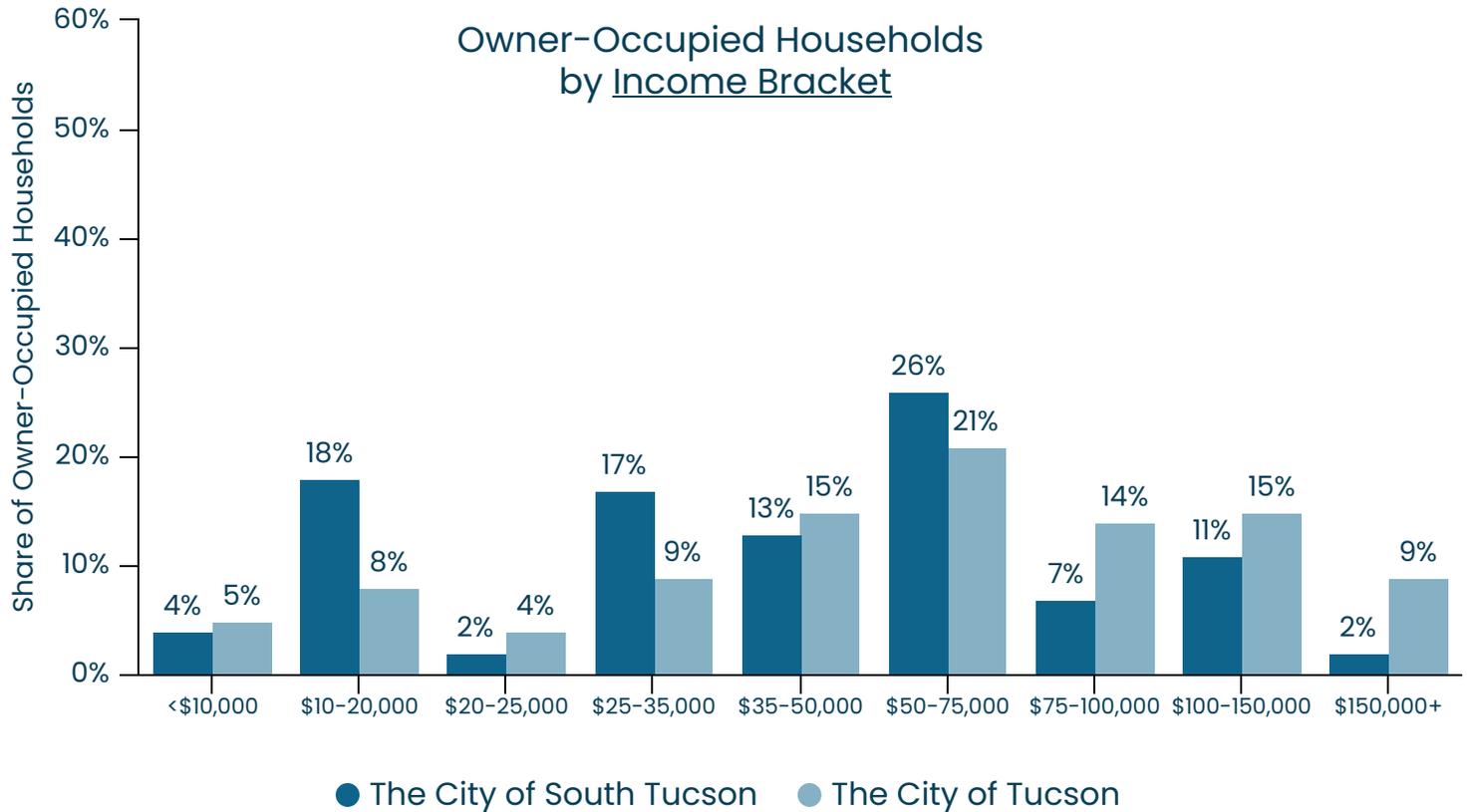
Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.



Section F

Owner Incomes & Values | South Tucson

A comparison of owner-occupied household incomes and home values by bracket.

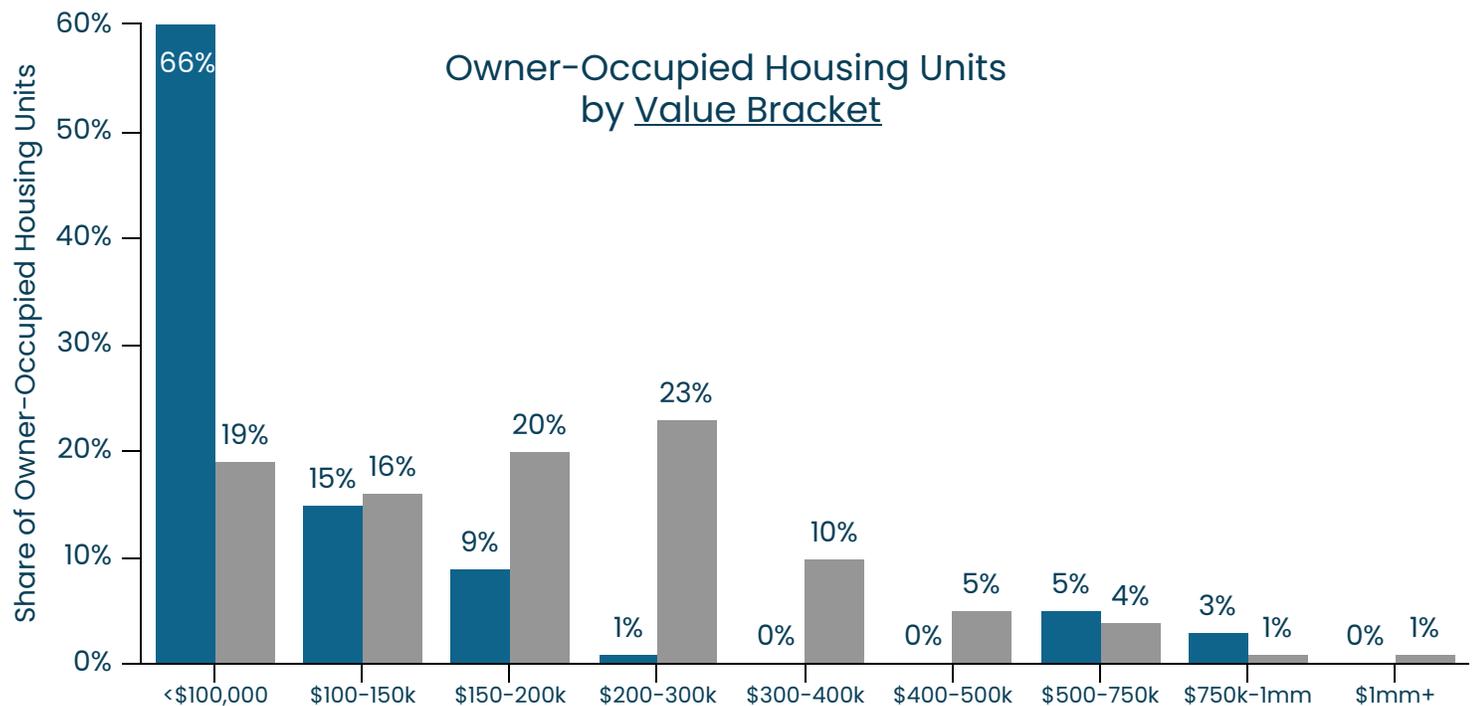
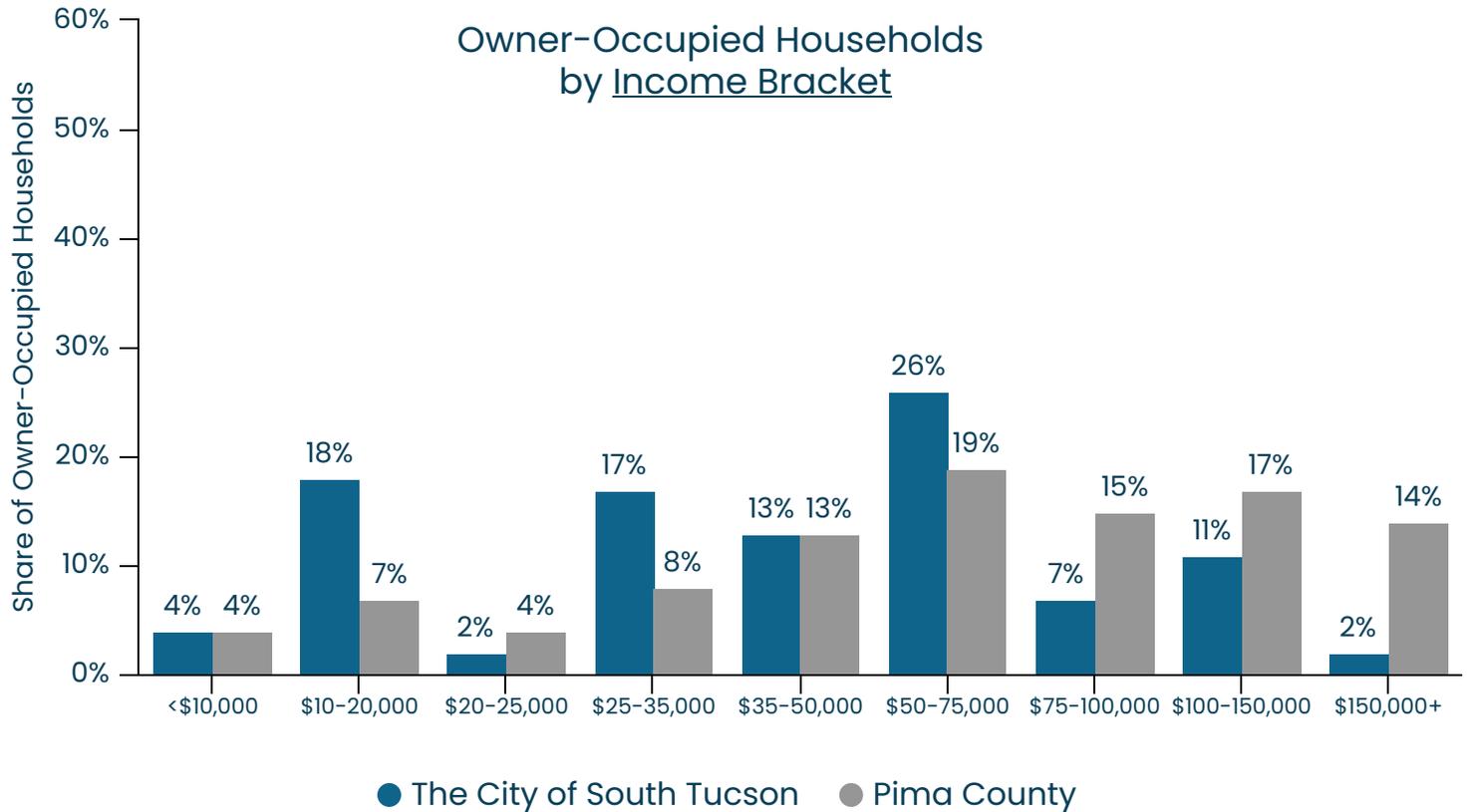


Underlying data by the Decennial Census and American Community Survey through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021. Categories might not sum to 100% due to minor rounding.



Owner Incomes & Values | South Tucson

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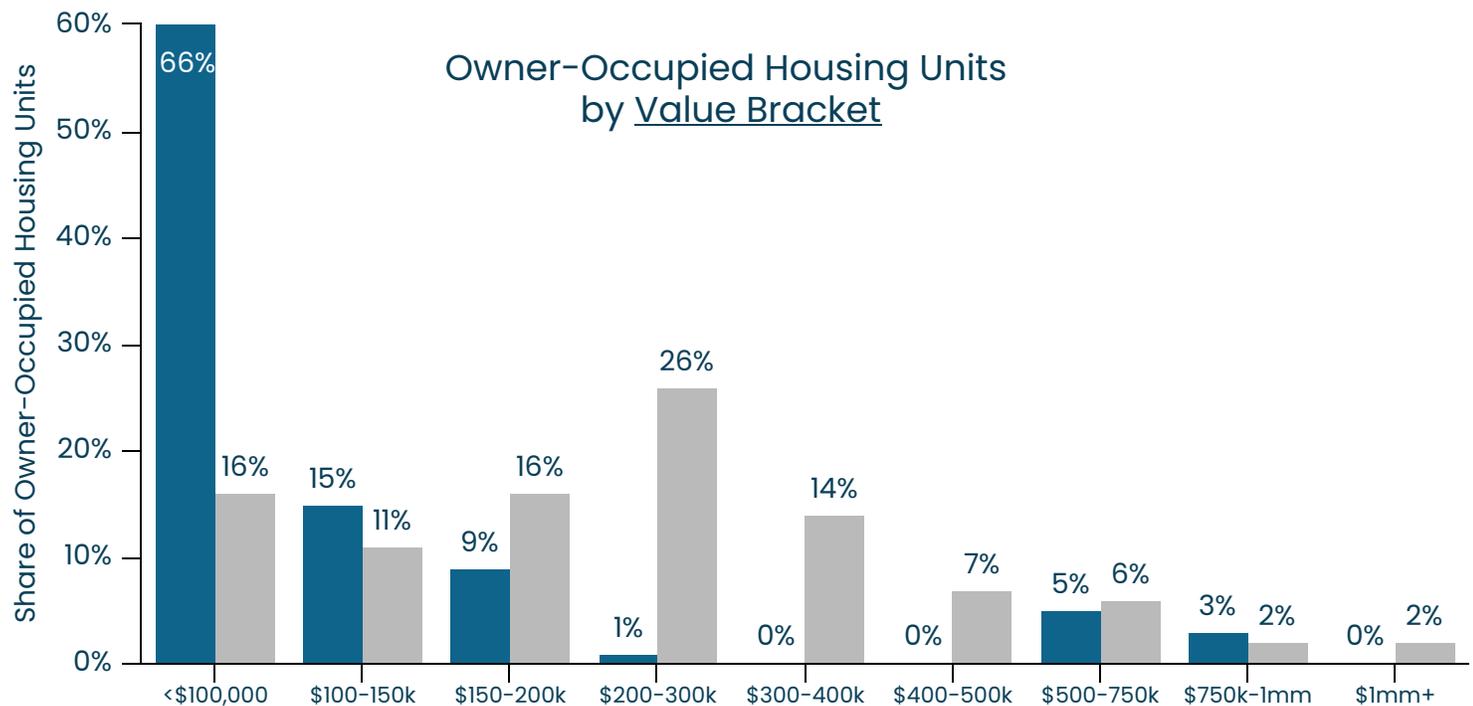
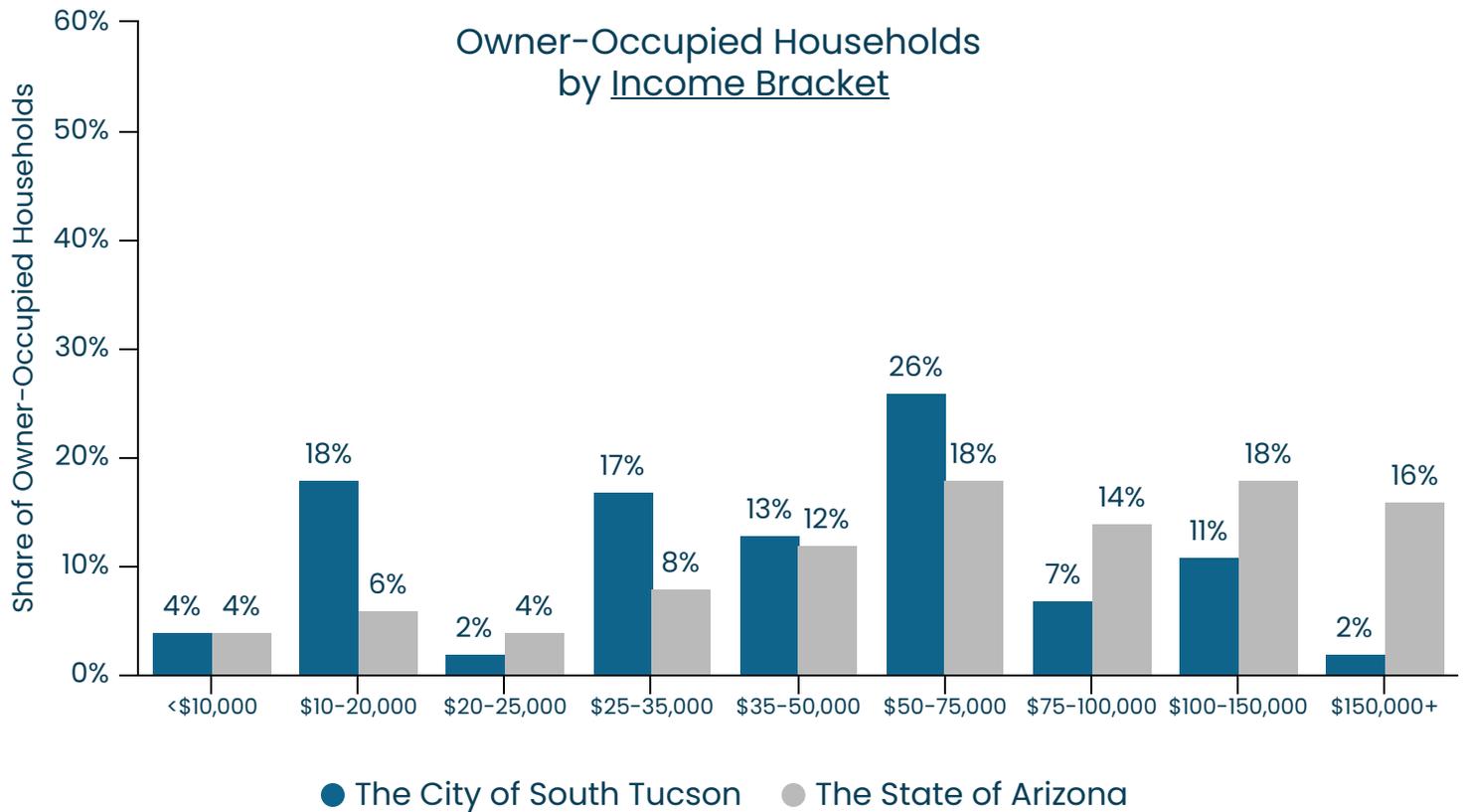


Underlying data by the Decennial Census and American Community Survey through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021. Categories might not sum to 100% due to minor rounding.



Owner Incomes & Values | South Tucson

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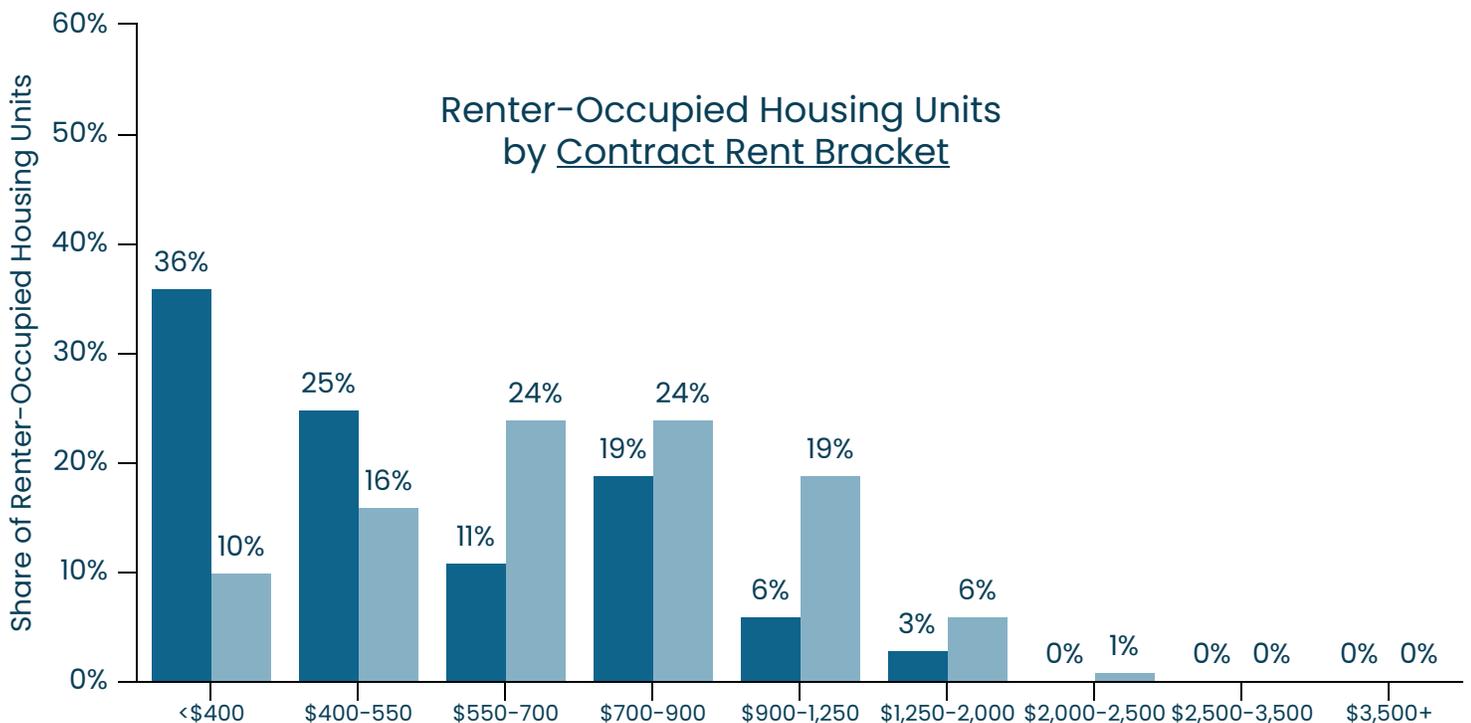
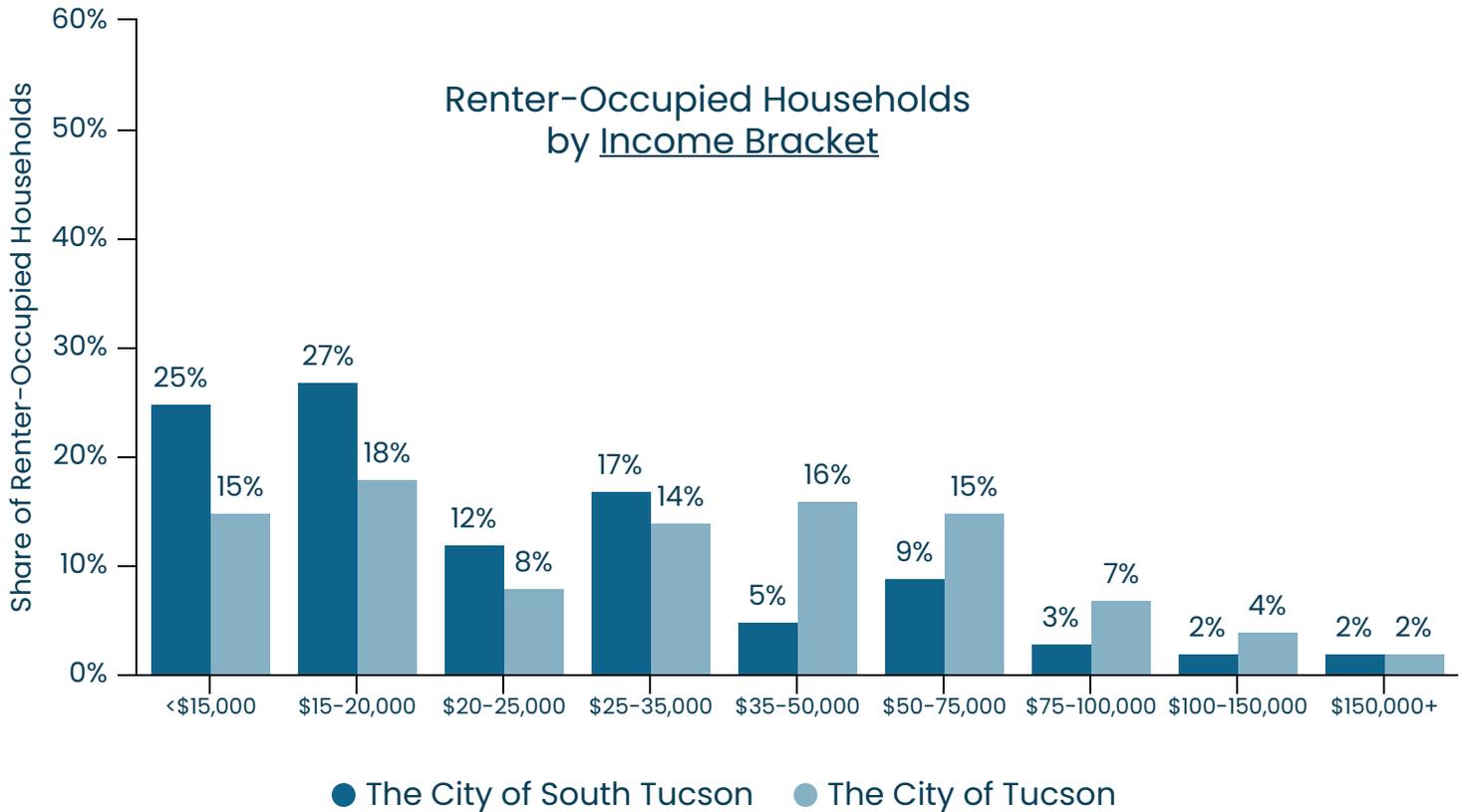


Underlying data by the Decennial Census and American Community Survey through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021. Categories might not sum to 100% due to minor rounding.



Renter Incomes & Prices | South Tucson

A comparison of renter-occupied household incomes and contract rents by bracket.

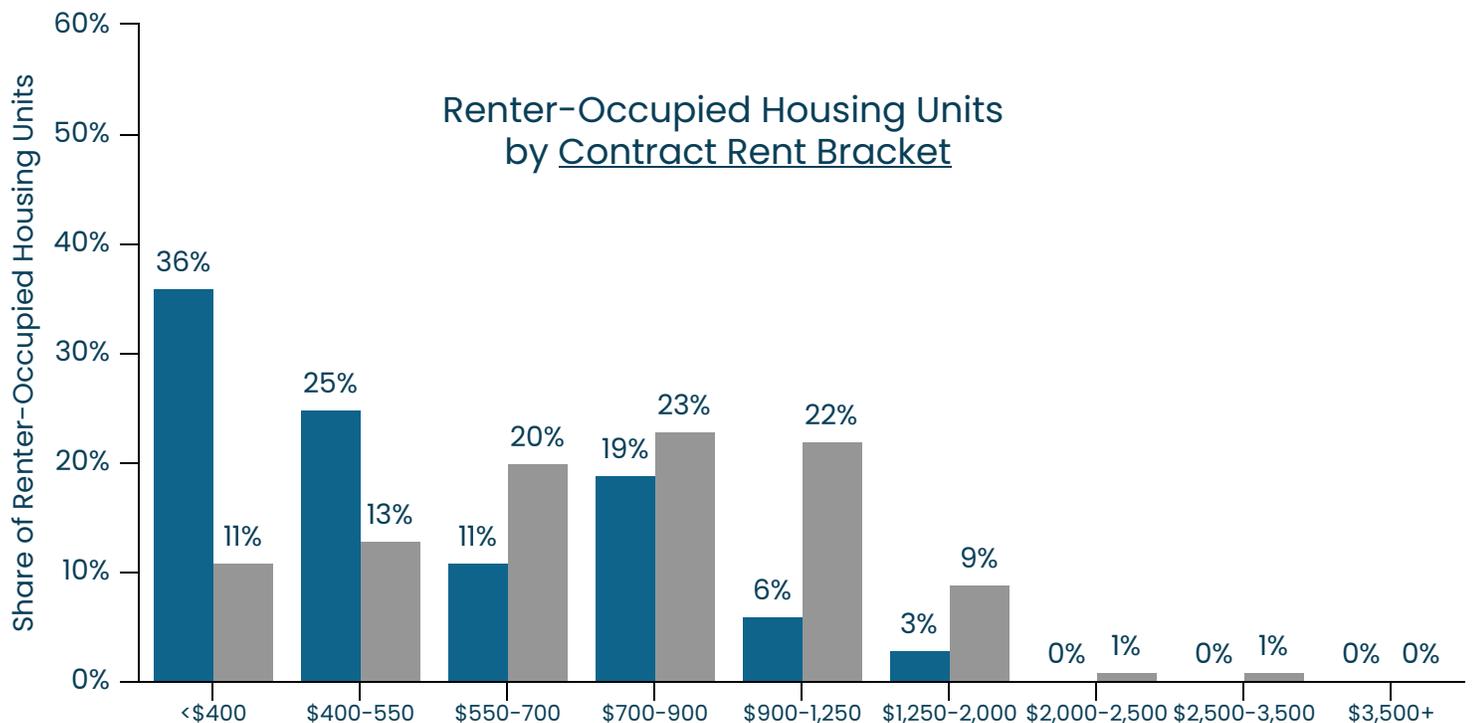
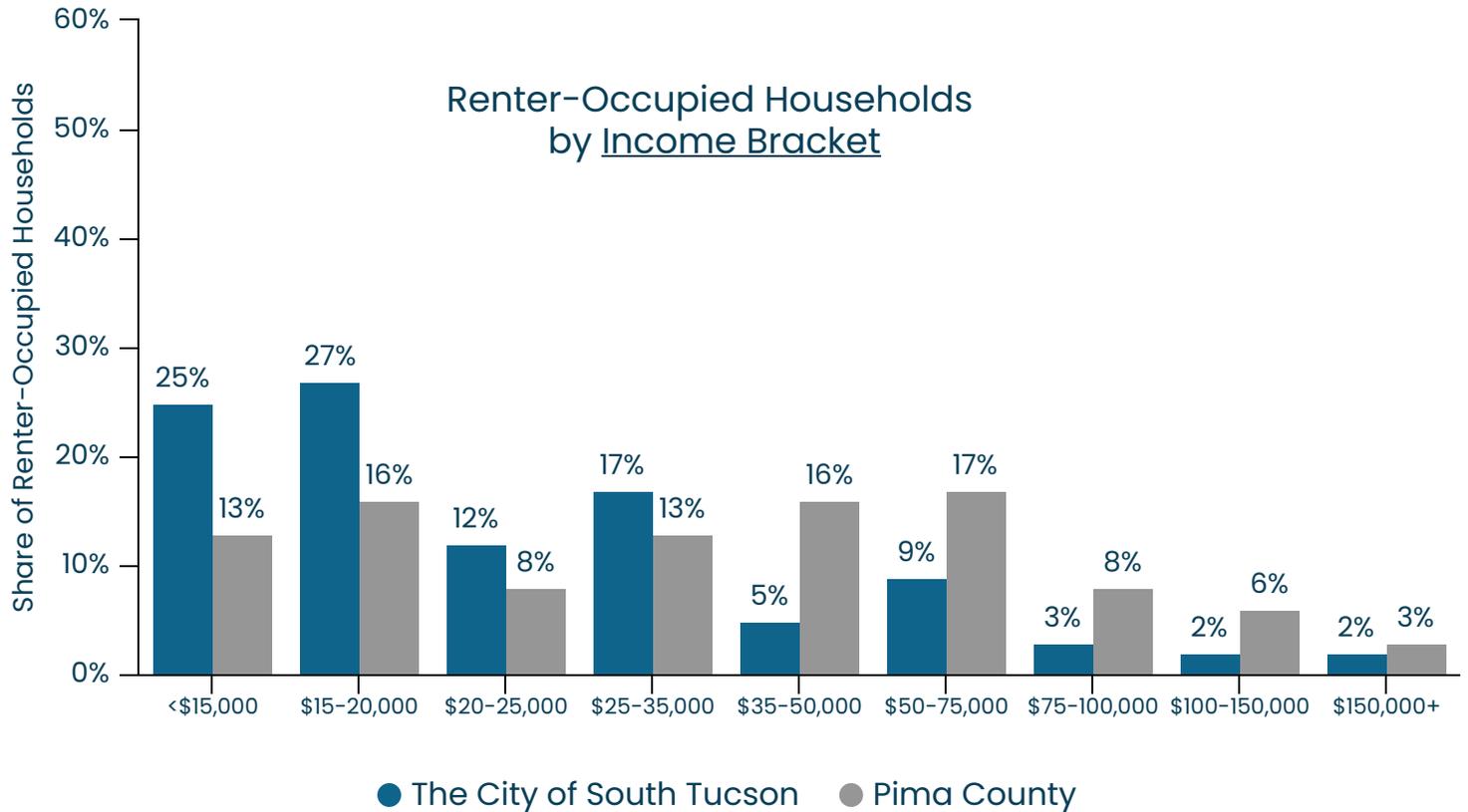


Underlying data by the Decennial Census and American Community Survey through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021. Categories might not sum to 100% due to minor rounding.



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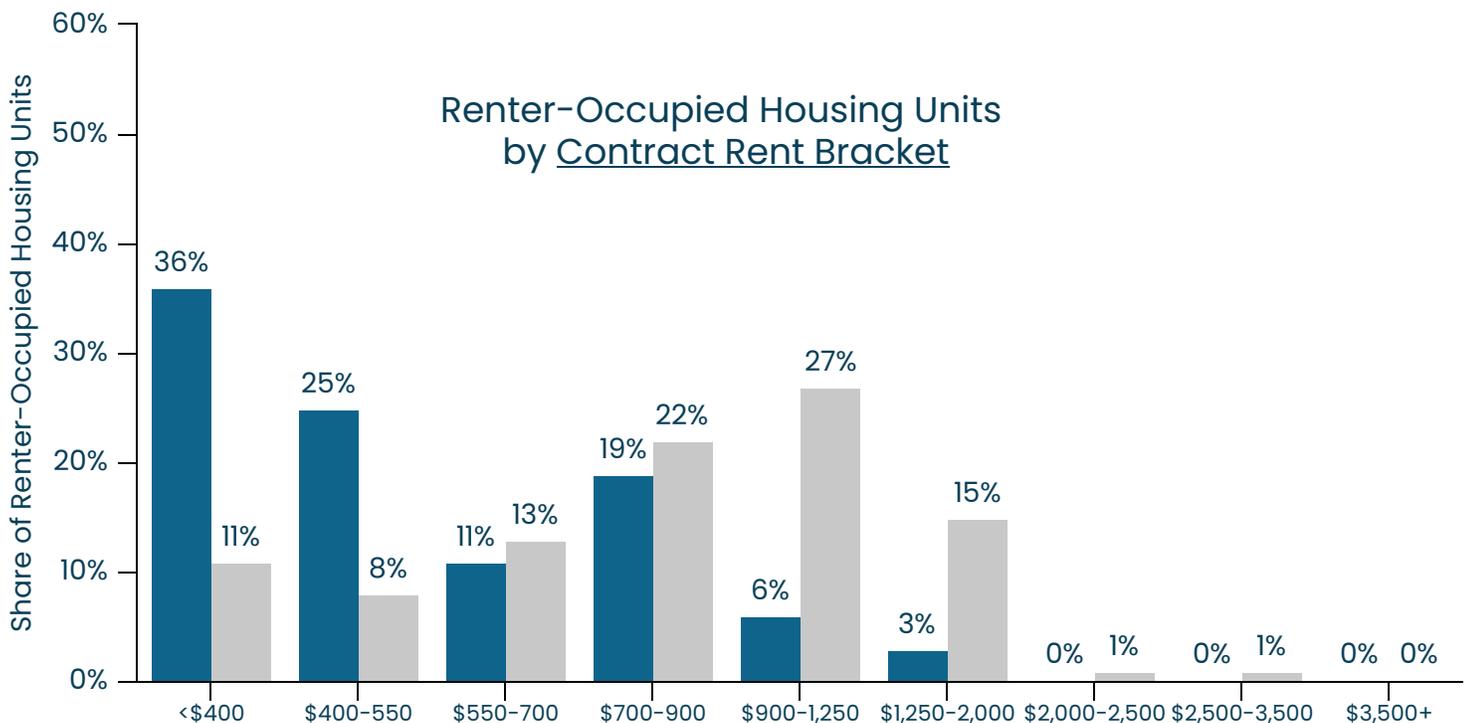
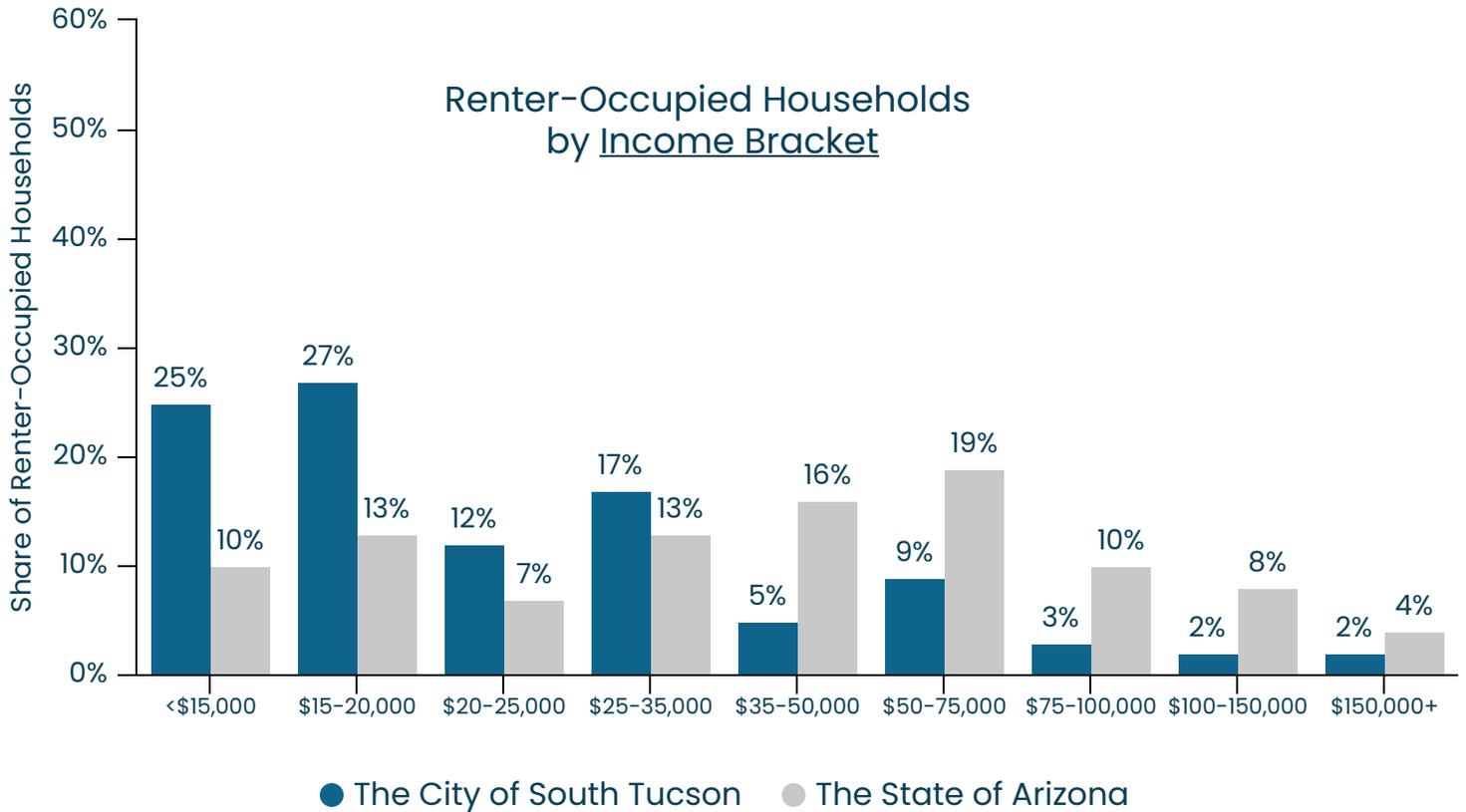


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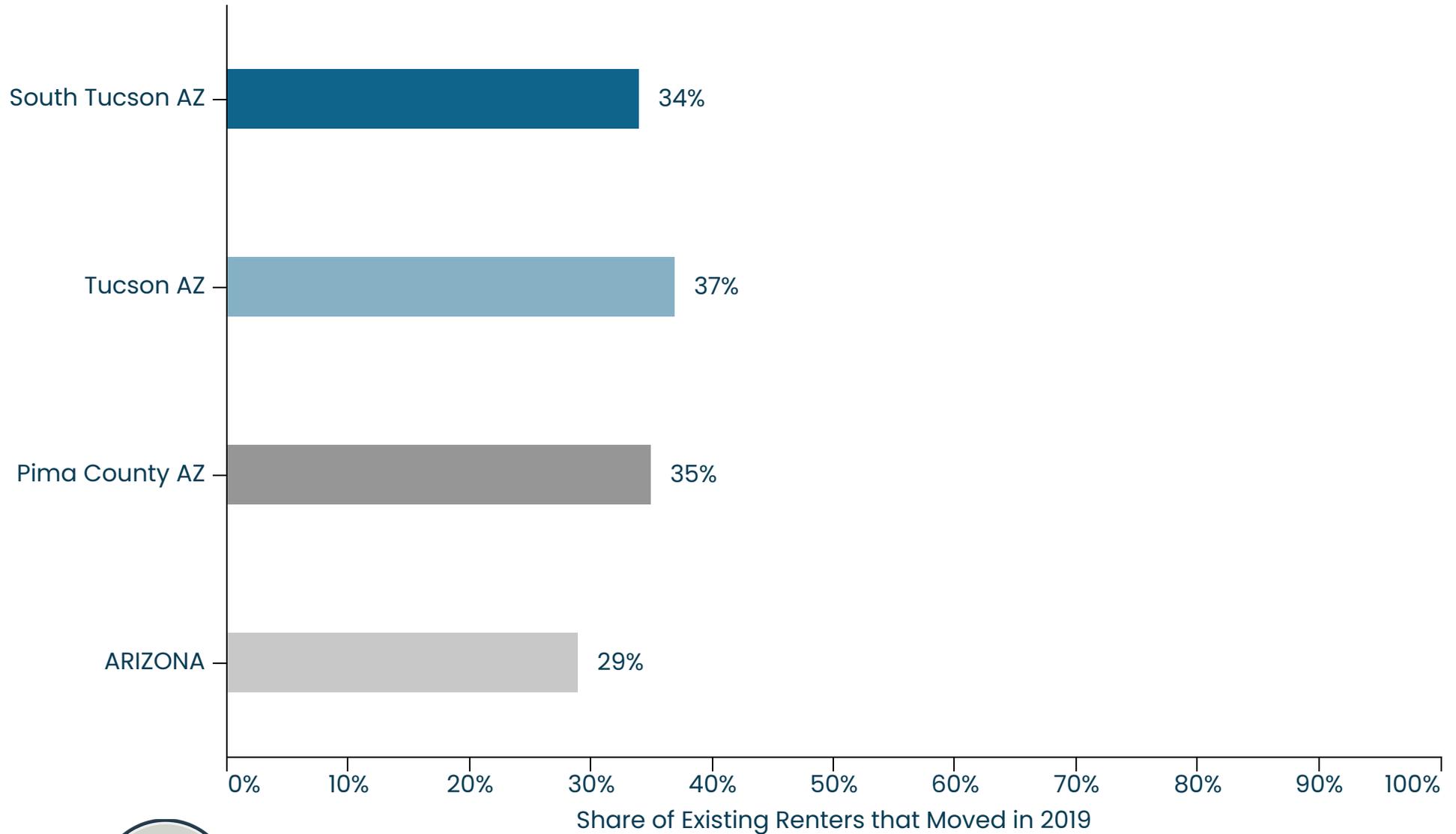


Section G

Section H

Share of Existing Renters that Moved in 2019

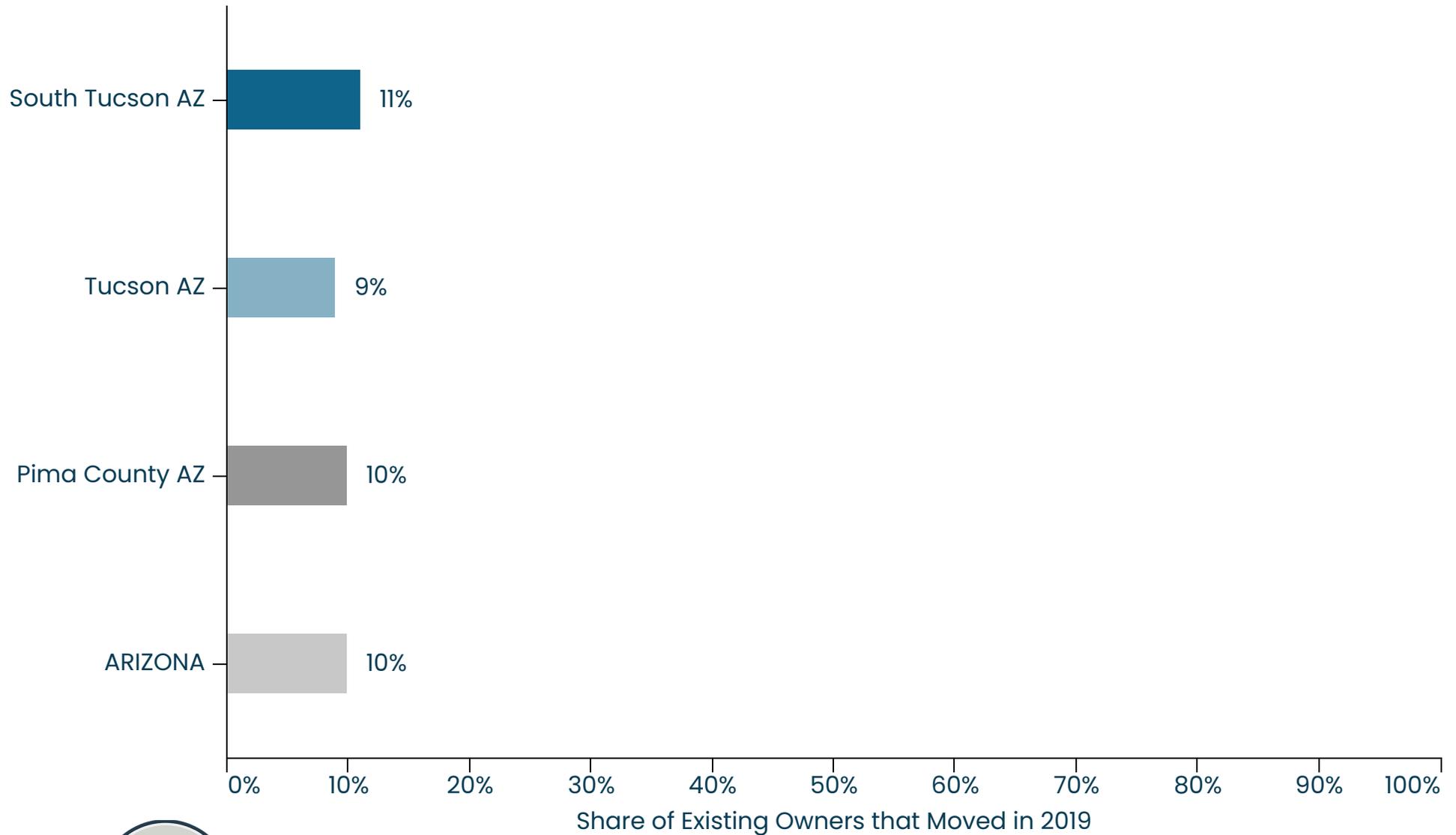
The City of South Tucson, Arizona



Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

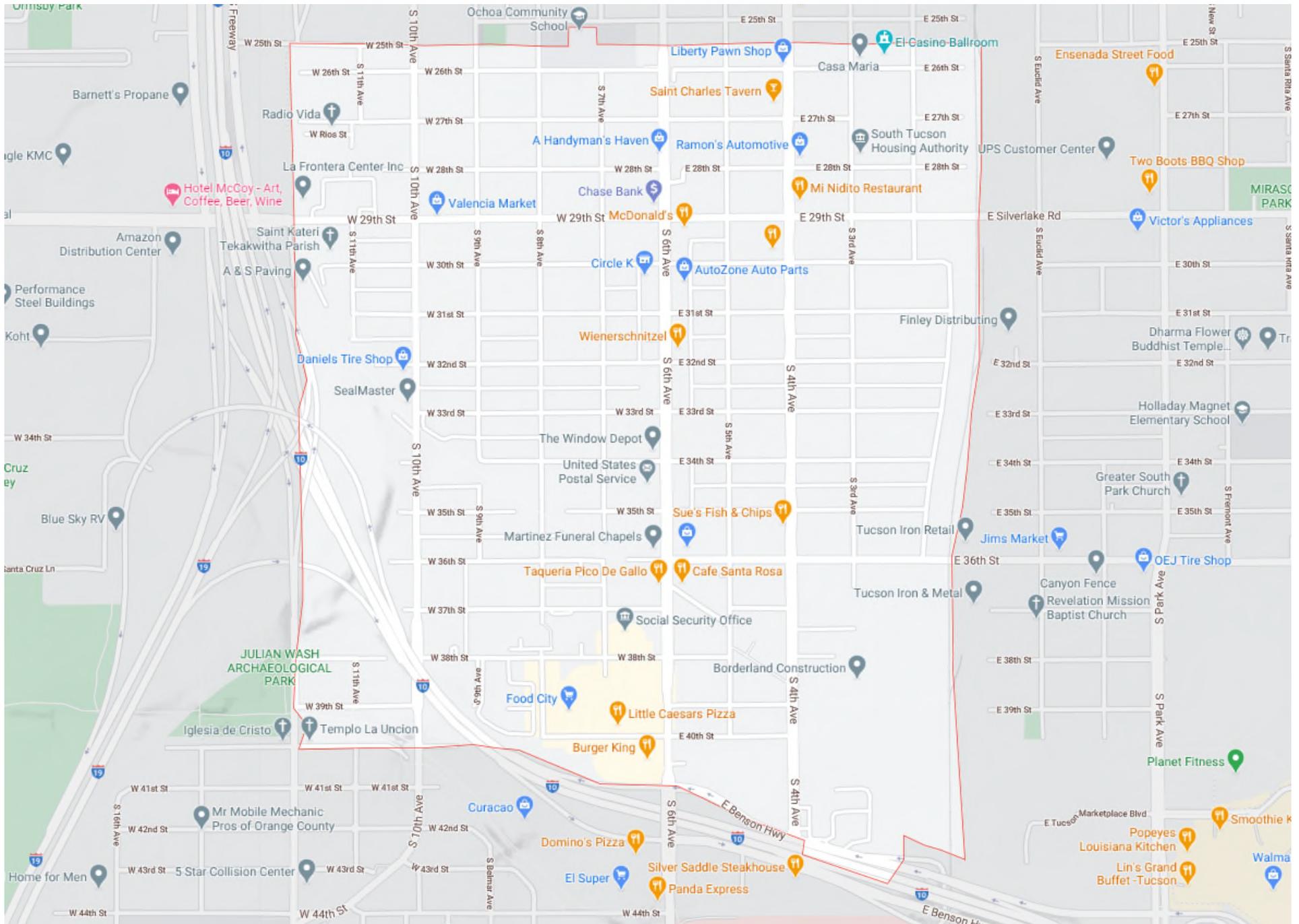
Share of Existing Owners that Moved in 2019

The City of South Tucson, Arizona

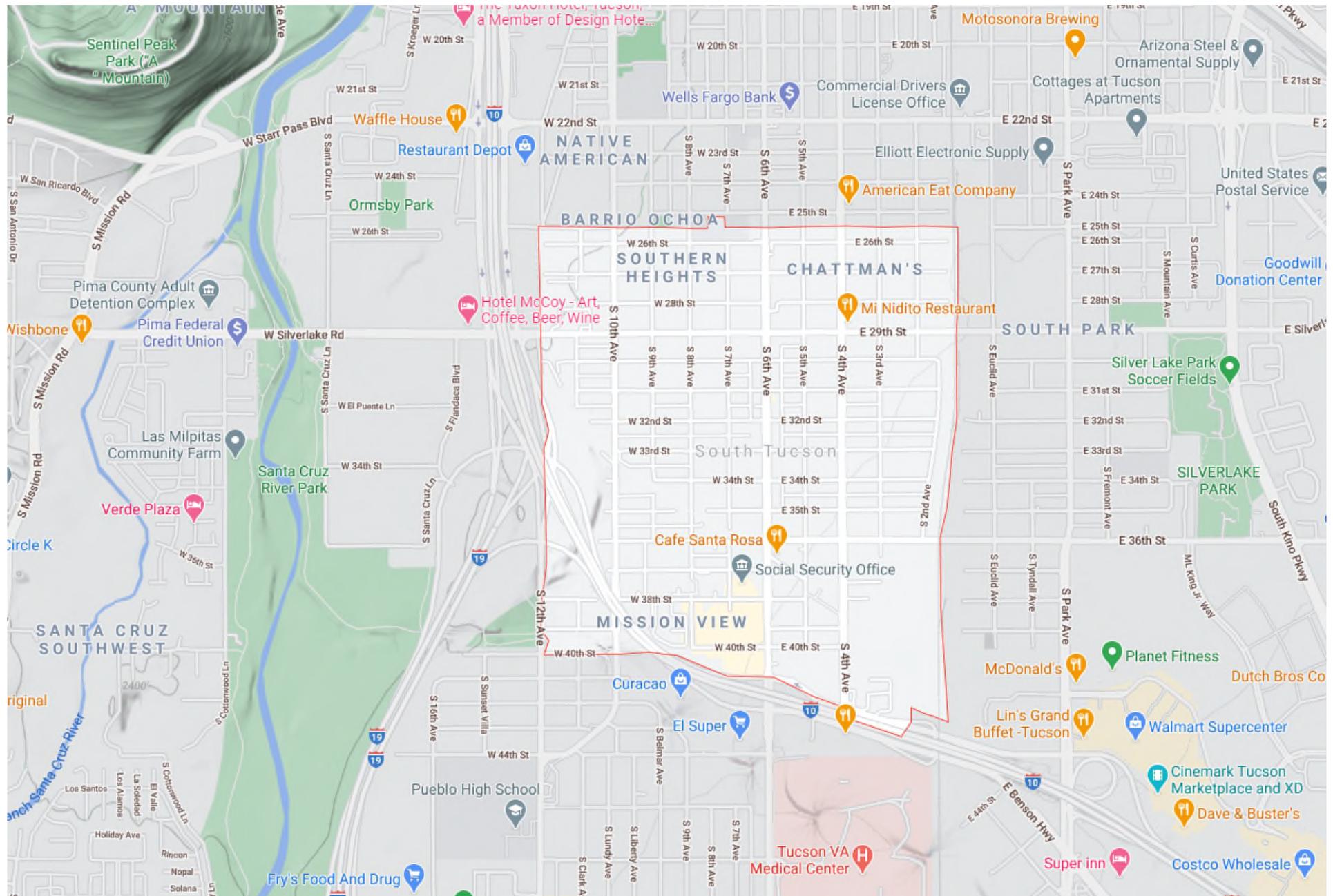


Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2019. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

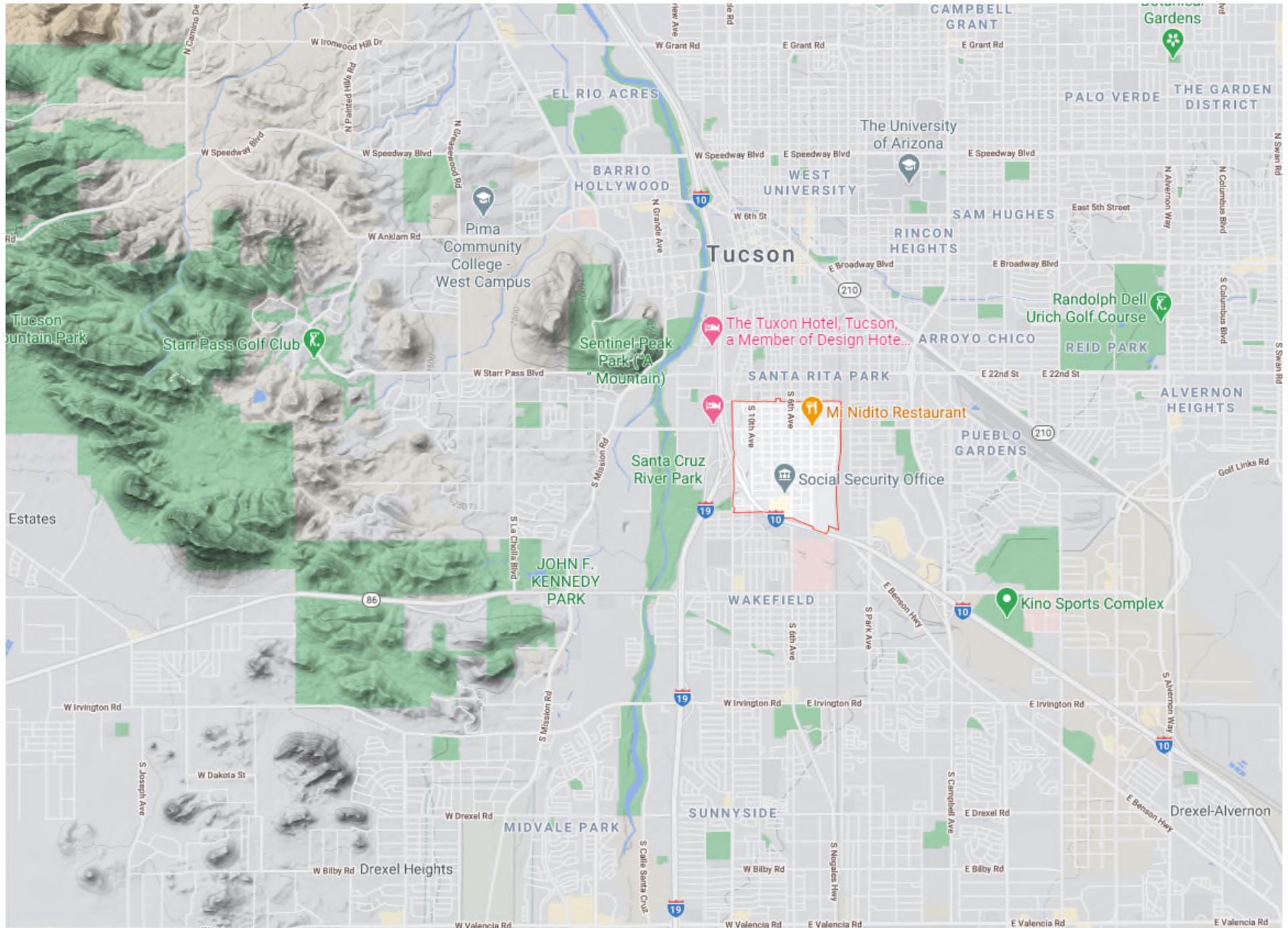
The City of South Tucson, Arizona



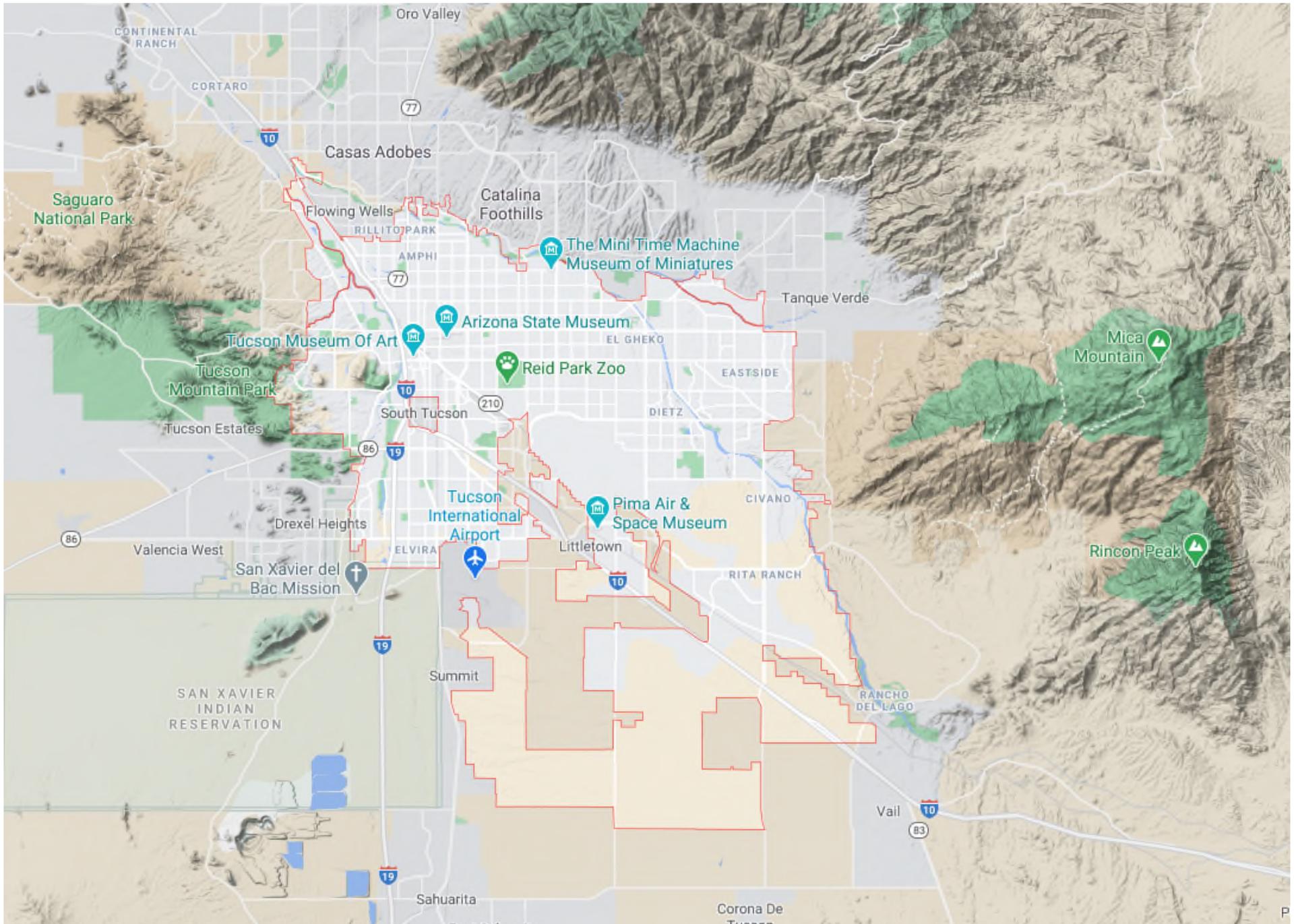
The City of South Tucson, Arizona



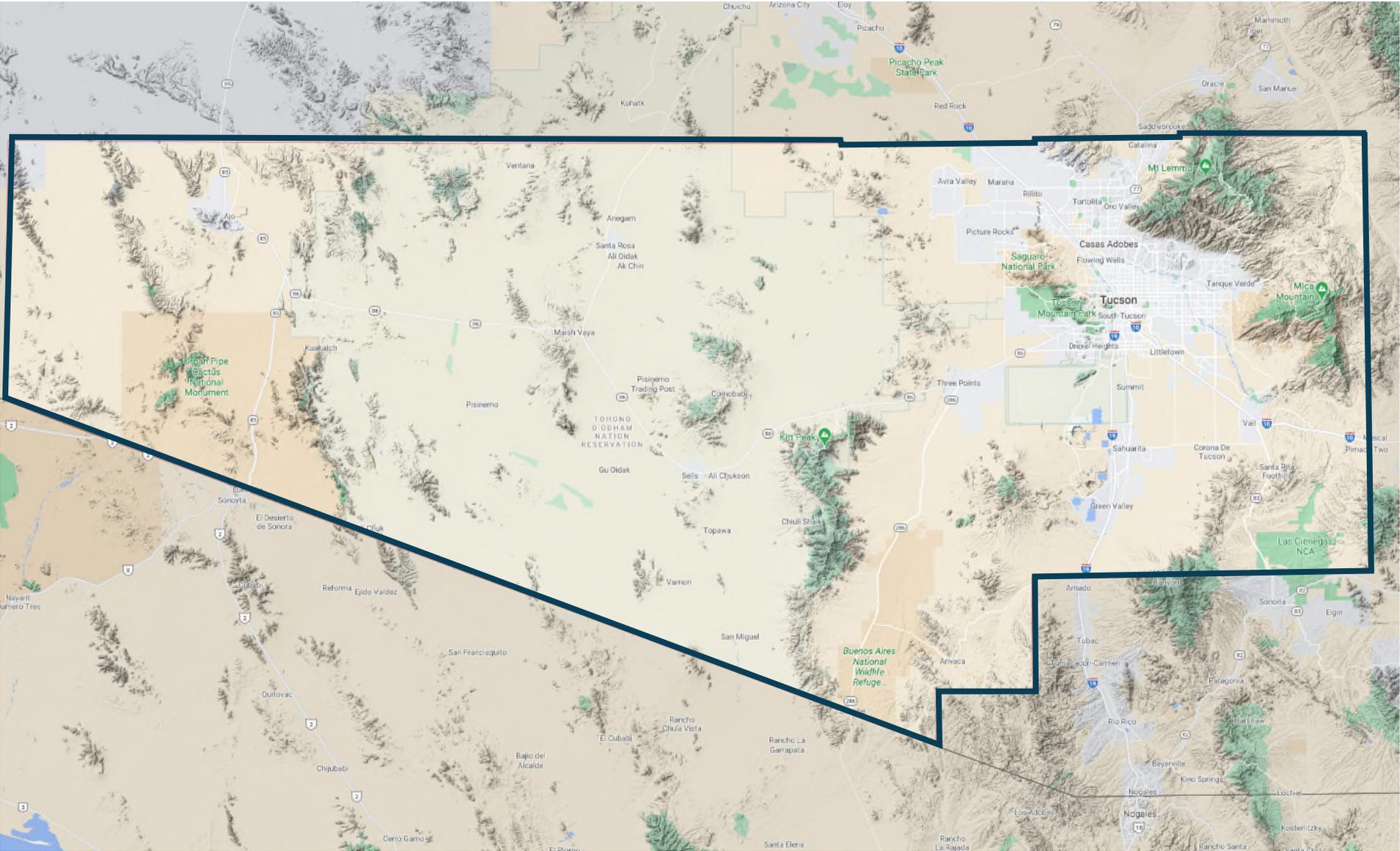
The City of South Tucson, Arizona



The City of Tucson, Arizona



Pima County, Arizona



The State of Arizona, Southwest United States

